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1.0 SUPPLIES OR SERVICES AND PRICES/COSTS

1.1 GENERAL

This acquisition is being conducted to establish a single award contract for the GSA Technology Transformation Service (TTS), Office of Products and Programs (OPP), to provide a commercial Contact Center support services for USA.gov. USA.gov is the official web channel of the Federal Government, serving as a gateway to Federal Government information. The Contact Center serves as the “voice of the Government” helping citizens navigate and understand Government programs, services and information. The Contact Center (herein referred to as “CC”) is a leader in Government customer service providing a high quality customer experience across all USA.gov channels. The CC will support USA.gov by providing customer support via telephone, email, and web chat. CC Information Specialists (IS) will serve as “consultants” to citizens, facilitating citizens to information, helping citizens navigate to appropriate resources and information, and answering questions that can be easily answered using approved content and resources. This work shall be performed in accordance with all sections of this contract and its attachments.

All interested GSA Multiple Award Schedule (MAS); SIN 132-20, 132-51 and 70-500 contract holders are eligible to submit a quote.

1.2 ORDER TYPE

The contractor shall perform the effort required by this contract on a Firm Fixed Price (FFP) and Time and Material (T&M)/Labor Hours (LH)) basis.

The contractor shall perform the efforts required by this TOR on a:

Firm-Fixed Price (FFP) basis for:

CLINs

10000

Labor Hour (LH) basis for:

CLINs

30001, 30001A, 30001B, 30001C, 30001D, 30001E

Time and Material (T&M) basis for:

CLINs

20000A, 20000B, 20000C, 20000D, 20000E, 30000, 30000A, 30000B, 30000C, 30000D, 30000E, 30001, 30001A, 30001B, 300001C, 30000D, 30001E, 40000, 40000A, 40000B, 40000C, 40000D, 40000E, 42000, 42000A, 42000B, 42000C, 42000D, 42000E, 44000, 44000A, 44000B, 44000C, 44000D, 44000E, 50000, 50000A, 50000B, 50000C, 50000D, 50000E, 60000, 60000A, 60000B, 60000C, 60000D, 60000E, 70000, 70000A, 70000B, 70000C, 70000D, 70000E, 80000, 80000A, 80000B, 80000C, 80000D, 80000E, 80002, 80002A, 80002B, , 80002D, 80002E, 80003, 80003A, 80003B, 80003C, 80003D, 80003E

Cost Reimbursable (CR) basis for:

CLINs

90000, 90000A, 90000B, 90000C, 90000D, 90000E, 95000, 95000A, 95000B, 95000C, 95000D, 95000E

The work shall be performed in accordance with all Sections of this TO and the vendor's General Services Administration (GSA) Multiple Award Schedule (MAS), under which the resulting TO will be placed. An acronym listing to support this Request for Quote (RFQ) is included in Section 16 – List of Attachments.

1.3 SERVICES AND PRICES

Except as specified herein, the contractor's price for each CLIN must include all costs for labor, material, equipment, etc., necessary to perform all requirements.

See Attachment B for Pricing Table

*** T&M CLINs – Hours associated with labor categories are estimates to be used for evaluation purposes only and shall not be altered in quote submissions.**

The following abbreviations are used in this price schedule:

CLIN	Contract Line Item Number
T&M	Time and Material
NTE	Not-to-Exceed
OLM	Order Level Materials
ODC	Other Direct Cost
LH	Labor Hours
CR	Cost Reimbursable

1.3.1 PRICES:

THE NTE CEILING AMOUNT REPRESENTS THE MAXIMUM AMOUNT OF THE GOVERNMENT'S LIABILITY. THE CONTRACTOR EXCEEDS THE CEILING AT ITS OWN RISK.

****Refer to Attachment B Pricing Worksheet***

1.4 TIME AND MATERIAL (T&M)/LABOR-HOUR (LH) LABOR MIX AND LEVEL OF EFFORT

The labor mix and level of effort specified by the Government solicitation are for evaluation purposes only. The contractor may reallocate, with prior written approval of the Contracting Officer, upon good cause shown, the number of hours by labor category, within each labor CLIN as needed to effectively manage the project, provided the total funded labor cost and total hours are not exceeded. Any additional labor categories or increases to total hours or increases to ceilings required during performance must be approved by the Contracting Officer (CO) and added to the TO by modification

1.5 INCREMENTAL FUNDING LIMITATION OF GOVERNMENT'S OBLIGATION

(a) Contract line items **40000, 50000, and 70000** are incrementally funded. For these item(s), the sum of **(b) (4)** of the total price is presently available for payment and allotted to this contract. An allotment schedule is set forth in Paragraph (J) of this clause.

(b) For item(s) identified in paragraph (a) of this clause, the Contractor agrees to perform up to the point at which the total amount payable by the Government, including reimbursement in the event of termination of those item(s) for the Government's convenience, approximates the total amount currently allotted to the contract. The Contractor is not authorized to continue work on those item(s) beyond that point. The Government will not be obligated in any event to reimburse the Contractor in excess of the amount allotted to the contract for those item(s) regardless of anything to the contrary in the clause entitled "Termination for Convenience of the Government." As used in this clause, the total amount payable by the Government in the event of termination of applicable contract line item(s) for convenience includes costs, profit, and estimated termination settlement costs for those item(s).

(c) Notwithstanding the dates specified in the allotment schedule in paragraph (j) of this clause, the Contractor shall be notified that funding is available by email (as annotated on the award document) to the contractor 15 days prior to the incremental funding dates as outlined in Paragraph J. Notice of funding will also be provided via a website (<https://finance3.gsa.gov>). If after such notification additional funds are not allotted prior to the expiration date, the Contracting Officer will terminate any item(s) for which additional funds have not been allotted, pursuant to the clause of this contract entitled "Termination for Convenience of the Government."

(d) When additional funds are allotted for continued performance of the contract line item(s) identified in paragraph (a) of this clause, the Contractor agrees to continue performance in accordance with the contract. The provisions of paragraphs (b) and (d) of this clause will apply in like manner to the additional allotted funds and agreed substitute date.

(e) If, solely by reason of failure of the Government to allot additional funds, by the dates indicated below in Paragraph J, in amounts sufficient for timely performance of the contract line item(s) identified in paragraph (a) of this clause, the Contractor incurs additional costs or is delayed in the performance of the work under this contract and if additional funds are allotted, an

equitable adjustment will be made in the price or prices (including appropriate target, billing, and ceiling prices where applicable) of the item(s), or in the time of delivery, or both. Failure to agree to any such equitable adjustment hereunder will be a dispute concerning a question of fact within the meaning of the clause entitled "Disputes."

(f) The Government may at any time prior to termination allot additional funds for the performance of the contract line item(s) identified in paragraph (a) of this clause.

(g) The termination provisions of this clause do not limit the rights of the Government under the clause entitled "Default." The provisions of this clause are limited to the work and allotment of funds for the contract line item(s) set forth in paragraph (a) of this clause. This clause no longer applies once the contract is fully funded except with regard to the rights or obligations of the parties concerning equitable adjustments negotiated under paragraphs (d) and (e) of this clause.

(h) Nothing in this clause affects the right of the Government to terminate this contract pursuant to the clause of this contract entitled "Termination for Convenience of the Government."

(i) Nothing in this clause shall be construed as authorization of voluntary services whose acceptance is otherwise prohibited under 31 U.S.C. § 1342.

(j) The parties contemplate that the Government will allot funds to this contract in increments from the date of award in accordance with the following schedule:

On execution of contract ____ (b) (4)

February 1, 2020 ____ (b) (4)

(End of clause)

2.0 PERFORMANCE WORK STATEMENT

Refer to Attachment C

3.0 PACKAGING AND MARKING

3.1 PRESERVATION, PACKAGING AND MARKING

All deliverables submitted to the Government shall indicate the contract number, TO number, contractor's name, description of items contain therein and the consignee's name and address for which the information is being submitted. The contractor shall follow the marking requirements specified by the Government.

All reports and deliverables should be submitted electronically through GSA's electronic contract system (ITSS) at:

<https://portal.fas.gsa.gov/group/aasbs-portal/itss-home>

All Testing and deliverables are to be developed and maintained by the Contractor using a secured repository. Government's access to the repository, at any level, should be granted upon request.

Deliverables that are submitted via other systems are not required to be submitted in ITSS. In lieu thereof, the contractor shall submit a list in ITSS with the name/description of the deliverable, date submitted, and delivery format. Copies of all deliverables shall also be delivered electronically to the TPOC and COR.

4.0 INSPECTION AND ACCEPTANCE BY THE GOVERNMENT

4.1 PLACE OF INSPECTION AND ACCEPTANCE

Inspection and acceptance of all work performed, reports and other deliverables under this contract shall be performed by the following GSA COR and the client representative:

Noble Holmes, PM General Services
Administration FAS-NCR, AAS
1800 F Street NW
Washington, DC 20405

Email: noble.holmes@gsa.gov

Barbara Walton, COR
1800 F Street NW
Washington, DC 20405
Email: barbara.walton@gsa.gov

4.2 SCOPE OF INSPECTION

All deliverables shall be inspected for content, completeness, accuracy, and conformance to TO requirements by the COR and TPOC. Inspection may include validation of information or software with the use of automated tools, testing, or inspections of the deliverables, as specified in the TO. The scope and nature of this inspection will be sufficiently comprehensive to ensure the completeness, quality, and adequacy of all deliverables.

The Government requires a period NTE 15 workdays after receipt of final deliverable items for inspection and acceptance or rejection.

4.3 BASIS OF ACCEPTANCE

The basis for acceptance shall be compliance with the requirements set forth in the TO and relevant terms and conditions of the contract. Deliverable items rejected shall be corrected in accordance with the applicable clauses.

The final acceptance will occur when all discrepancies, errors, or other deficiencies identified in writing by the Government have been resolved, through documentation updates, program correction, or other mutually agreeable methods. Reports, documents, and narrative-type deliverables will be accepted when all discrepancies, errors, or other deficiencies identified in writing by the Government have been corrected. If the draft deliverable is adequate, the Government may accept the draft and provide comments for incorporation into the final version.

All of the Government's comments on deliverables shall either be incorporated in the succeeding version of the deliverable, or the contractor shall explain to the Government's satisfaction why such comments should not be incorporated.

If the Government finds that a draft or final deliverable contains spelling errors, grammatical errors, or improper format, or otherwise does not conform to the quality assurance requirements stated within this TO, the document may be rejected without further review and returned to the contractor for correction and resubmission. If the contractor requires additional Government guidance to produce an acceptable draft, the contractor shall arrange a meeting with the GSA COR.

4.4 DELIVERABLES

The Government will provide written acceptance, comments, and/or change requests, if any, within 15 workdays (unless specified otherwise in Section 5 – Deliveries or Performance) from Government receipt of the deliverable and/or draft deliverable. Upon receipt of the Government comments, the contractor shall have ten workdays to incorporate the Government's comments and/or change requests and to resubmit the deliverable in its final form.

4.5 WRITTEN ACCEPTANCE/REJECTION BY THE GOVERNMENT

The government will provide written notification of acceptance or rejection of all final deliverables within 15 workdays (unless specified otherwise in Section 5 – Deliveries or Performance). All notifications of rejection will be accompanied with an explanation of the specific deficiencies causing the rejection.

4.6 NON-CONFORMING PRODUCTS OR SERVICES

Non-conforming products or services will be rejected. Deficiencies shall be corrected at sole contractor expense, by the contractor, within 10 workdays of the rejection notice. If the deficiencies cannot be corrected within ten workdays, the contractor shall immediately notify the GSA COR of the reason for the delay and provide a proposed corrective action plan within 10 workdays.

If the contractor does not provide products or services that conform to the requirements of this TO, the Government will withhold the fixed price until the non-conforming products or services are remediated.

5.0 PLACE OF PERFORMANCE AND DELIVERABLES

5.1 PERIOD OF PERFORMANCE

The Period of Performance (PoP) for this TO is a six-month Base Period, five (5) one-year Option Periods and one (1) six-month Option Period as follows:

Base Period:	09/30/2020 – 03/29/2021
Option Year One:	03/30/2021 – 03/29/2022
Option Year Two:	03/30/2022 – 03/29/2023
Option Year Three:	03/30/2023 – 03/29/2024
Option Year Four:	03/30/2024 – 03/29/2025
Option Period Five:	03/30/2025 – 09/29/2025

5.2 PLACE OF PERFORMANCE

All work will be primarily performed at the contractor's facility. Very limited long-distance travel is anticipated. The Contractor may be requested by the Contracting Officer to travel to Washington, D.C. to meet with GSA personnel in-person. If this is required, travel will be reimbursed pursuant to government travel regulations and approved by the COR in writing in advance.

5.3 PUBLIC RELEASE OF CONTRACT DOCUMENTS REQUIREMENT

The contractor agrees to submit, within ten workdays from the date of the CO's execution of the initial TO, or any modification to the TO (exclusive of Saturdays, Sundays, and Federal holidays), a portable document format (PDF) file of the fully executed document with all proposed necessary redactions, including redactions of any trade secrets or any commercial or financial information that it believes to be privileged or confidential business information, for the purpose of public disclosure at the sole discretion of GSA. The contractor agrees to provide a detailed written statement specifying the basis for each of its proposed redactions, including the applicable exemption under the Freedom of Information Act (FOIA), 5 United States Code (U.S.C.) § 552, and, in the case of FOIA Exemption 4, 5 U.S.C. § 552(b)(4), shall explain why the information is considered to be a trade secret or commercial or financial information that is privileged or confidential. Information provided by the contractor in response to the contract requirement may itself be subject to disclosure under the FOIA. Submission of the proposed redactions constitutes concurrence of release under FOIA. GSA will carefully consider the contractor's proposed redactions and associated grounds for nondisclosure prior to making a final determination as to what information in such executed documents may be properly withheld.

5.4 TASK ORDER (TO) SCHEDULE AND MILESTONE DATES

The following schedule of milestones will be used by the GSA COR to monitor timely progress under this TO.

	Deliverable	Due Date	Update Frequency	PWS Section with Further Details
1	Contingency and disaster recovery plan	75 days	As needed	Section 3.3
2	Program management plan	15 days	As needed	Section 3.1.1
3	Technical Test and acceptance plan	30 days	As needed prior to technology upgrades	Section 3.1.2
4	Quality Assurance Surveillance Plan (QASP)	60 days	As needed	Section 3.1.3
5	Transition plan	As part of the RFQ	N/A	Section 3.2.1
6	Security plan	45 days	As needed	Section 5.5.1
7	Comprehensive training plan	30 days	As needed	Section 3.9.1
8	Performance reports		Daily/weekly	Section 3.6.1
9	Billing/volume/metric reports		Monthly	Section 3.6.2
10	Performance and narrative report		Monthly	Section 3.6.3
11	Topic and asset usage report		Monthly	Section 3.6.4
12	Customer Satisfaction (CSAT) report		Monthly	Section 3.6.5
13	Quality Assurance report		Monthly	Section 3.6.6
14	Action and improvement report		Monthly	Section 3.6.7
15	Intraday Reporting		As needed	Section 3.6.8

16	Technology and program management review		Annually	Section 2.1.6
17	OLM report		Monthly	Section 5.4
18	Ad hoc reports		As needed	Section 3.6.9
19	IT reports		Monthly/quarterly/annual	Section 3.6.10
20	Customer Agency reports		Monthly/Daily/As needed	Section 3.6.11
21	IVR Reports (for vendor-hosted IVR solutions only)		Monthly	Section 3.6.12
22	Innovation pilot proposals		As needed	Section 2.1.6
23	SECTION 508 Accessibility Report		NLT 20 Days After Award of TO	RFQ Section 7.8

Deliverables are due the next Government workday if the due date falls on a holiday or weekend

5.5 NOTICE REGARDING LATE DELIVERY/ PROBLEM NOTIFICATION

The contractor shall notify the GSA COR via email as soon as it becomes apparent to the contractor that a scheduled delivery will be late. The contractor shall include in the email the rationale for late delivery, the expected date for the delivery, and the project impact of the late delivery. The GSA COR will review the new schedule and provide guidance to the contractor. Such notification in no way limits any Government contractual rights or remedies including, but not limited to, termination.

5.6 CONTRACTOR FURNISHED ITEMS AND SERVICES

Contractor Furnished Items and Responsibilities: The Contractor shall furnish all supplies, equipment, facilities, and services required to perform work under this contract, which are not identified to be furnished by the government.

5.6 PLACE(S) OF DELIVERY

Copies of all deliverables shall be delivered to the GSA COR at the following address:

GSA TTS
Barbara Walton, COR
1800 F Street NW
Washington, DC 20405
Email: barbara.walton@gsa.gov

6.0 CONTRACT ADMINISTRATION

6.1 CONTRACTING OFFICER

1. The CO is the only individual who can legally commit the Government to the expenditure of public funds. No person other than the CO can make any changes to the terms, conditions, general provisions, or other stipulations of this contract.
2. The CO is the only person with the authority to act as agent of the Government under this contract. Only the CO has authority to:
 - a. Direct or negotiate any changes in the statement of work;
 - b. Assign work;
 - c. Modify or extend the period of performance;
 - d. Change the delivery schedule;
 - e. Authorize reimbursement to the Contractor of any costs incurred during the performance of this contract; and
 - f. Otherwise change any terms and conditions of this contract.
3. No information other than that which may be contained in an authorized modification to this contract, duly issued by the CO, shall be considered grounds for deviation from any stipulation of this contract.
4. The Government may unilaterally change its CO designation, after which it will notify Contractor in writing of such change.

6.2 CONTRACTING OFFICER'S REPRESENTATIVE

The CO will appoint a COR in writing through a COR Appointment Letter. The COR will receive, for the Government, all work called for by the TO and will represent the CO in the technical phases of the work. The COR will provide no supervisory or instructional assistance to contractor personnel.

The COR is not authorized to change any of the terms and conditions, scope, schedule, and price of the TO. Changes in the scope of work will be made only by the CO by properly executed modifications to the TO.

6.3 TECHNICAL POINT OF CONTACT

The Technical Point of Contact (TPOC) is a representative from GSA duly appointed, in writing, by the Contracting Officer. The TPOC is responsible for monitoring the Contractor's performance and compliance for all matters falling under the purview of the client agency and advising the COR. The TPOC, in coordination with the COR, functions as the "eyes and ears" of the CO ensuring all the technical requirements under the contract/task order are met by the delivery date or within the period of performance, and at the price or within the ceiling stipulated in the Task Order. The TPOC shall not assign or direct any work or task of any type and the contractor shall seek contracting officer endorsement of any TPOC request prior to performing any such work or task.

The CO, in accordance with FAR subpart 1.6, and section 6.1 above, is the only person authorized to make or approve any contractual commitments or changes in any of the requirements, terms or conditions of this task order. Any purported changes, requests or authorizations that the Contractor deems may affect contract, price, terms or conditions of the task order shall be immediately referred to the CO for action. Failure to comply with this requirement is considered an event of default. In the event the Contractor makes any changes at the direction or request of any person other than the CO, the change will be considered to have been made without authority and no adjustment will be made to the task order price to cover any increase in cost incurred as a result thereof

6.4 CONTRACT ADMINISTRATION

Contracting Officer:

Victor Purcell

1800 F Street, NW

Washington, DC 20006

Email: victor.purcell@gsa.gov

Contract Specialist:

Tiffany Burroughs

1800 F Street, NW

Washington, DC 20006

Email: tiffany.burroughs@gsa.gov

Contracting Officer's Representative:

Barbara Walton, COR

1800 F Street NW

Washington, DC 20006

Email: barbara.walton@gsa.gov

6.5 INVOICE SUBMISSION

For all invoices, the contractor shall provide invoice backup data, including labor categories, rates and quantity of labor hours (when applicable).

The contractor shall submit Requests for Payments in accordance with the format contained in General Services Administration Acquisition Manual (GSAM) 552.232-25, Prompt Payment (Nov 2009), to be considered proper for payment. In addition, the following data elements shall be included on each invoice.

Task Order Number

Paying Number: (ACT/DAC NO.)

GSA Project Number: ID11200028

Project Title: USAGov Contact Center Services

The contractor shall submit invoices as follows:

The contractor shall utilize GSA's electronic Assisted Services Shared Information System (ASSIST) to submit invoices. The contractor shall manually enter CLIN charges into Central Invoice Services (CIS) in the ASSIST Portal. Summary charges on invoices shall match the charges listed in CIS for all CLINs. The contractor shall submit invoices electronically by logging onto the following link (requires Internet Explorer to access the link):
<https://portal.fas.gsa.gov>

Log in using your assigned ID and password, navigate to the order against which you want to invoice, click the Invoices and Acceptance Reports link in the left navigator, and then click the *Create New Invoice* button. By utilizing this method, no paper copy of the invoice shall be submitted to GSA or the GSA Finance Center. The contractor shall provide invoice backup data, as an attachment to the invoice, in accordance with the contract type, including detail such as labor categories, rates, and quantities of labor hours per labor category. The GSA COR may require the contractor to submit a written "hardcopy" invoice with the client's certification prior to invoice payment. A paper copy of the invoice is required for a credit.

The contractor is certifying, by submission of an invoice in the CIS, that the invoice is correct and proper for payment.

If there are any issues submitting an invoice, contact the Assisted Acquisition Services Business Systems (AASBS) Help Desk for support at 877-472-4877 (toll free) or by email at AASBS.helpdesk@gsa.gov.

6.6 INVOICE REQUIREMENTS

Each Task Order type shall be addressed separately in the invoice submission.

The final invoice is desired to be submitted within six months of project completion. Upon project completion, the contractor shall provide a final invoice status update monthly.

Regardless of contract type, the contractor shall report the following data:

Task Order Award Number (NOT the Solicitation Number).

- Contractor Invoice Number.
- Contractor Name.
- Point of Contact Information.
- Current period of performance.
- Amount of invoice that was subcontracted.

All invoices shall indicate that the work associated with the invoice was performed pursuant to the task order or contracting officer direction, and not at the direction of the COR, the TPOC or any official other than the warranted contracting officer.

6.6.1 TIME AND MATERIAL (T&M)/LABOR HOURS (LH) CLINs

The contractor may invoice monthly on the basis of hours incurred for the T&M and LH CLINs. The invoice shall include the period of performance covered by the invoice (all current charges shall be within the active period of performance) and the CLIN number and title. All hours and costs shall be reported by CLIN element (as shown in Section 1 – Supplies or Services and Prices and Attachment B), by contractor employee, and shall be provided for the current billing month and in total from project inception to date. The contractor shall provide the invoice data in spreadsheet form with the following detailed information. The listing shall include separate columns and totals for the current invoice period and the project to date.

- Employee name (current and past employees).
- Employee company.
- Employee labor category and hours worked.
- Monthly and total cumulative hours worked.
- Corresponding TO ceiling rate.
- Hours incurred not billed by CLIN.
- Total Amount Paid (Lump Sum) by CLIN.

6.6.2 TRAVEL

The Contractor may be requested to travel to Washington, D.C. to meet with GSA personnel in-person. If this is required, travel will be reimbursed pursuant to government travel regulations and approved by the COR in writing in advance.

6.6.3 ORDER LEVEL MATERIAL (OLMs)

The contractor may invoice monthly on the basis of pre-approved cost incurred for the OLM CLINs. The invoice shall include the period of performance covered by the invoice and the CLIN number and title and Interagency Agreement (IA) number. In addition, the contractor shall provide the following detailed information for each invoice submitted, as applicable. Spreadsheet submissions are required.

- a. OLMs purchased
- b. Consent to Purchase number or identifier
- c. Date accepted by the Government
- d. Associated CLIN
- e. Project-to-date totals by CLIN
- f. Cost incurred not billed
- g. Remaining balance of the CLIN

All cost presentations provided by the contractor shall also include Overhead charges, General and Administrative charges and Fee.

6.6.4 FIRM-FIXED-PRICE (FFP) CLINs

The contractor may invoice as stated in Section 1 – Supplies or Services and Prices for the FFP CLINs. The invoice shall include the deliverable period covered by the invoice (all current

charges shall be within the active period of performance) and the CLIN number and title. All prices shall be reported by CLIN element (as shown in Section 1 – Supplies or Services and Prices, Attachment B) and shall be provided for the current invoice and in total from project inception to date. The contractor shall provide the invoice data in spreadsheet form with the following detailed information. The listing shall include separate columns and totals for the current invoice period and the project to date.

- a. FFP deliverable period – as stated in Section 1 – Supplies or Services and Prices, Attachment B))
- b. Total Amount Paid (Lump Sum) by CLIN

6.6.5 TRAVEL

Contractor costs for travel will be reimbursed at the limits set in the following regulations (see FAR 31.205-46):

- a. Federal Travel Regulation (FTR) - prescribed by the GSA, for travel in the contiguous United States (U.S.).

The contractor may invoice monthly on the basis of cost incurred for cost of travel comparable with the FTR. The invoice shall include the period of performance covered by the invoice and the CLIN number and title. Separate worksheets, in MS Excel format, shall be submitted for travel.

CLIN/Task Total Travel: This invoice information shall identify all cumulative travel costs billed by CLIN/Task. The current invoice period's travel details shall include separate columns and totals and include the following:

- a. Travel Authorization Request (TAR) identifier, approver name, and approval date.
- b. Current invoice period.
- c. Names of persons traveling.
- d. Number of travel days.
- e. Dates of travel.
- f. Number of days per diem charged.
- g. Per diem rate used.
- h. Total per diem charged.
- i. Transportation costs (rental car, air fare, etc.).
- j. Total charges.
- k. Explanation of variances exceeding ten percent of the approved versus actual costs.

7.0 SPECIAL CONTRACT REQUIREMENTS

7.1 KEY PERSONNEL

See Section 3.8 of the PWS for key personnel positions, descriptions and qualification requirements. The contractor shall identify Key Personnel by name.

7.1.2 KEY PERSONNEL SUBSTITUTIONS

The contractor shall not replace any personnel designated as Key Personnel without the written concurrence of the GSA CO. Prior to utilizing other than the Key Personnel specified in its quote in response to the RFQ, the contractor shall notify the GSA CO and COR. This notification shall be no later than ten calendar days in advance of any proposed substitution and shall include justification (including resume(s) and labor category of proposed substitution(s)) in sufficient detail to permit evaluation of the impact on TO performance.

Substitute Key Personnel qualifications shall be equal to, or greater than, those of the Key Personnel substituted. If the GSA CO and the GSA COR determine that a proposed substitute Key Personnel is unacceptable, or that the reduction of effort would be so substantial as to impair the successful performance of the work under the TO, the contractor may be subject to default action as prescribed by FAR 52.249-8, Default (Fixed-Price Supply and Service) and FAR 52.249-6 Alternate IV, Termination.

7.2 GOVERNMENT-FURNISHED PROPERTY (GFP)

Government-furnished property will not be furnished under this requirement.

7.2.1 GOVERNMENT-FURNISHED INFORMATION (GFI)

Refer to PWS.

7.3. SECURITY REQUIREMENTS HSPD-12

7.3.1 HSPD-12

The contractor shall comply with all security requirements. All contract personnel performing under this contract shall be U.S. citizens with a security clearance at the Public Trust Level One. See table in Part 2.12. Applicable Publications of this PWS.

Contractor personnel shall be required to obtain and maintain security badges and adhere to the installation security requirements as applicable at the task order level. Homeland Security Presidential Directive (HSPD-12) mandates the issuance of a common form of identification for all federal employees and contractors for use in accessing government-controlled facilities and information systems. As a result, contract employees that require access to federal facilities for 6 months or more shall have the ability to pass a National Agency Check with Credit (NACIC) background investigation and obtain the HSPD-12 identification, if necessary for performance,

before receiving computer access. The Contractor shall be responsible for the cost of complying with HSPD-12.

If a contractor is a non-citizen but has been a U.S. resident for at least three consecutive years they can work on the contract after the following background checks are conducted: FBI Fingerprint and Name Check, National Crime Information Center (NCIC)/Interstate Identification Index (III)/National Law Enforcement Telecommunications System (NLETS)/Wanted Person Check, Citizen and Immigration Services Check (CIS)/e-Verify.

Non-U.S. citizens who do not meet the three-year resident requirement and receive a favorable result on the required checks for initial access will not receive a Government issued PIV card until the three-year residency requirement is met. Requesting officials will need to complete a short-term or Special Agreement Check (SAC) every six months until the three-year residency requirement is met, at which point an appropriate investigations of Tier 1 (formerly NACI) or higher should be requested.

7.3.2 PIV CARD

The Contractor shall establish and implement methods of making sure all PIV cards issued to the Contractor by the Government are not lost or misplaced and are not used by unauthorized persons. NOTE: All references to keys include PIV cards. No PIV card issued to the Contractor by the Government shall be duplicated. The Contractor shall develop procedures covering PIV card control that shall be included in the Quality Control Plan. Such procedures shall include turn-in of any issued PIV cards by personnel who no longer require access to locked areas. The Contractor shall immediately report any occurrences of lost or duplicate PIV cards to the Contracting Officer.

In the event PIV cards, are lost or duplicated, the Contractor shall, upon direction of the Contracting Officer, replace the affected cards; however, the Government, at its option, may replace the affected cards or perform re-keying. When the replacement of cards are performed by the Government, the total cost of the replacement of the card shall be deducted from the monthly payment due the Contractor. In the event a master card is lost or duplicated, all cards for that system shall be replaced by the Government and the total cost deducted from the monthly payment due the Contractor.

The Contractor shall prohibit the use of Government issued PIV cards by any persons other than the Contractor's employees. The Contractor shall prohibit the opening of locked areas by Contractor employees to permit entrance of persons other than Contractor employees engaged in the performance of assigned work in those areas, or personnel authorized entrance by the Contracting Officer.

7.3.3 INFORMATION ASSURANCE

The contractor may have access to sensitive (including privileged and confidential) data, information, and materials of the U.S. Government. These printed and electronic documents are for internal use only and remain the sole property of the U.S. Government. Some of these

materials are protected by the Privacy Act of 1974 (AMENDED) and Title 38. Unauthorized disclosure of Privacy Act or Title 38 covered materials is a criminal offense.

7.3.4 GSA INFORMATION TECHNOLOGY (IT) SECURITY REQUIREMENTS

The contractor shall deliver an IT Security Plan (Section 5.4 – Deliveries or Performance, Deliverable 6 (PWS reference section 5.5.1)) within 45 calendar days of award that describes the processes and procedures that will be followed to ensure appropriate security of IT resources that are developed, processed, or used under this order. The IT Security Plan shall comply with, and shall ensure Government compliance with all applicable Federal laws and regulations including, but not limited to, 40 U.S.C. 11331, the Federal Information Security Management Act (FISMA) of 2002, and the E-Government Act of 2002. The IT Security Plan shall meet IT security requirements in accordance with Federal and GSA policies and procedures, including General Services Administration Acquisition Regulation (GSAR) clause 552.239-71. The contractor shall submit written proof of IT security authorization (Section 5.4 – Deliveries or Performance, Deliverable 6 (PWS reference section 5.5.1)) six months after award, and verify that the IT Security Plan remains valid annually.

7.3.5 SAFEGUARDING SENSITIVE DATA AND INFORMATION TECHNOLOGY RESOURCES

This section applies to all users of sensitive data and IT resources, including awardees, contractors, subcontractors, lessors, suppliers and manufacturers.

The following GSA policies must be followed. These policies can be found at <http://www.gsa.gov/directives>.

- a. CIO 2100.1K GSA Information Technology (IT) Security Policy
- b. CIO P 2100.2B GSA Wireless Local Area Network (LAN) Security
- c. CIO 2100.3B Mandatory Information Technology (IT) Security Training Requirement for Agency and Contractor Employees with Significant Security Responsibilities
- d. CIO 2102.1 Information Technology (IT) Integration Policy
- e. CIO 2104.1A GSA Information Technology (IT) General Rules of Behavior
- f. CIO CHGE 1 2105.1C GSA Section 508: Managing Information Technology and Communications Technology (ICT) for Individuals with Disabilities
- g. CIO 2106.1 GSA Social Media Policy
- h. CIO 2107.1 Implementation of the Online Resource Reservation Software
- i. CIO 2160.4A Provisioning of Information Technology (IT) Devices
- j. CIO 2162.1 Digital Signatures
- k. CIO P 2165.2 GSA Telecommunications Policy
- l. CIO P 2180.1 GSA Rules of Behavior for Handling Personally Identifiable Information (PII)
- m. CIO 2182.2 Mandatory Use of Personal Identity Verification (PIV) Credentials
- n. CIO P 1878.2A Conducting Privacy Impact Assessments (PIAs) in GSA
- o. CIO 9297.1 GSA Data Release Policy
- p. CIO 9297.2C GSA Information Breach Notification Policy
- q. ADM P 9732.1D Suitability and Personnel Security

This section shall be inserted in all subcontracts.

7.4 ORGANIZATIONAL CONFLICT OF INTEREST AND NON-DISCLOSURE REQUIREMENTS

7.4.1 ORGANIZATIONAL CONFLICT OF INTEREST (OCI)

Contractor and subcontractor personnel performing work under this contract may receive, have access to or participate in the development of proprietary or source selection information (e.g., cost or pricing information, budget information or analyses, specifications or work statements, etc.) or perform evaluation services which may create a current or subsequent Organizational Conflict of Interests (OCI) as defined in FAR Subpart 9.5. The Contractor shall notify the GSA CO immediately whenever it becomes aware that such access or participation may result in any actual or potential OCI and shall promptly submit a plan to the GSA CO to avoid or mitigate any such OCI. The Contractor's mitigation plan will be determined to be acceptable solely at the discretion of the GSA CO and in the event the GSA CO unilaterally determines that any such OCI cannot be satisfactorily avoided or mitigated, the GSA CO may utilize other remedies as he or she deems necessary, including prohibiting the Contractor from participation in subsequent contracted requirements which may be affected by the OCI.

7.4.2 NON-DISCLOSURE REQUIREMENTS

If the contractor acts on behalf of, or provides advice with respect to any phase of an agency procurement, as defined in FAR 3.104-4, then the contractor shall execute and submit a Corporate Non-Disclosure Agreement (NDA) Form and ensure that all its personnel (to include subcontractors, teaming partners, and consultants) who will be personally and substantially involved in the performance of the TO:

1. Are instructed in the FAR 3.104 requirements for disclosure, protection, and marking of contractor bid or quote information, or source selection information.
2. Are instructed in FAR Part 9 for third-party disclosures when acting in an advisory capacity.
3. All proposed replacement contractor personnel shall also be instructed in the requirements of FAR 3.104. Any information provided by contractors in the performance of this TO or obtained from the Government is only to be used in the performance of the TO. The contractor shall put in place appropriate procedures for the protection of such information and shall be liable to the Government for any misuse or unauthorized disclosure of such information by its personnel, as defined above.

7.5 IDENTIFICATION OF CONTRACTOR EMPLOYEES

As stated in 48 CFR 211.106, Purchase Descriptions for Service Contracts, contractor personnel shall identify themselves as contractor personnel by introducing themselves or being introduced as contractor personnel and by displaying distinguishing badges or other visible identification for meetings with Government personnel. Contractor personnel shall appropriately identify themselves as contractor employees in telephone conversations and in formal and informal written correspondence.

7.6 TRAVEL AUTHORIZATION REQUESTS

Before undertaking long-distance travel to any Government site or any other site in performance of this TO, the contractor shall have this long-distance travel approved by, and coordinated with, the GSA COR. Notification shall include, at a minimum, the number of persons in the party, traveler name(s), destination, duration of stay, purpose, and estimated cost. Prior to any long-distance travel, the contractor shall prepare a TAR for Government review and approval. Long-distance travel will be reimbursed for cost of travel comparable with the FTR.

Requests for long-distance travel approval shall:

- a. Be prepared in a legible manner.
- b. Include a description of the travel proposed including a statement as to purpose.
- c. Be summarized by traveler.
- d. Identify the TO number.
- e. Identify the CLIN associated with the travel.
- f. Be submitted in advance of the travel with sufficient time to permit review and approval.

The contractor shall use only the minimum number of travelers and rental cars needed to accomplish the task(s). Long-distance travel shall be scheduled during normal duty hours whenever possible.

7.6 INTELLECTUAL PROPERTY RIGHTS

The existence of any patent, patent application, or other intellectual property right that encumbers any deliverable must be disclosed in writing on the cover letter that accompanies the delivery. If no such disclosures are provided, the data rights provisions in FAR 52.227-14 apply to the maximum extent possible.

7.7 PRESS/NEWS RELEASE

The contractor shall not make any press/news release pertaining to this procurement without prior Government approval and only in coordination with the GSA CO.

7.8 SECTION 508 COMPLIANCE REQUIREMENTS

Unless the Government invokes an exemption, all Electronic and Information Technology (EIT) products and services proposed shall fully comply with Section 508 of the Rehabilitation Act of 1973, per the 1998 Amendments, 29 United States Code (U.S.C.) 794d, and the Architectural and Transportation Barriers Compliance Board's Electronic and Information Technology Accessibility Standards at 36 Code of Federal Regulations (CFR) 1194. The contractor shall provide a 508 Product Accessibility Report. The 508 Product Accessibility Report shall identify all EIT products and services proposed, identify the technical standards applicable to all products and services proposed, and state the degree of compliance with the applicable standards. Additionally, the contractor must clearly indicate where the information pertaining to Section

508 compliance can be found (e.g., Vendor's or other exact web page location).

8.0 CONTRACT CLAUSES

8.1 FAR 52.252-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)

This TO incorporates one or more clauses by reference with the same force and effect as if they were given in full text. Upon request, the CO will make their full text available. Also, the full text of a clause may be accessed electronically at the FAR website:

<http://www.acquisition.gov/far/>

FAR	TITLE	DATE
52.203-13	Contractor Code of Business Ethics and Conduct	OCT 2015
52.203-14	Display of Hotline Posters (fill in or provide link to client's posters)	OCT 2015
52.203-17	Contractor Employee Whistleblower Rights and Requirement to Inform Employees of Whistleblower Rights	APR 2014
52.204-2	Security Requirements	AUG 1996
52.204-9	Personal Identity Verification of Contractor Personnel	JAN 2011
52.212-4, Alt 1	Contract Terms and Conditions-Commercial Items, Alternate 1	JAN 2017
52.224-1	Privacy Act Notification	APR 1984
52.224-2	Privacy Act	APR 1984
52.224-3	Privacy Training	JAN 2017
52.225-13	Restrictions on Certain Foreign Purchases	JUN 2008
52.232-7	Payments under Time-and-Materials and Labor-Hour Contracts	AUG 2012
52.232-18	Availability of Funds	APR 1984
52.232-40	Providing Accelerated Payments to Small Business Subcontractors	DEC 2013
52.239-1	Privacy or Security Safeguards	AUG 1996
52.246-5	Inspection of Services—Cost-Reimbursement	APR 1984
52.246-25	Limitation of Liability—Services	FEB 1997
52.249-8	Default (Fixed-Price Supply and Service)	APR 1984
52.249-14	Excusable Delays	APR 1984
52.249-6, Alt 5	Termination (Cost-Reimbursement).	SEP 1996
52.251-1	Government Supply Sources	APR 2012

8.2 FAR CLAUSES INCORPORATED BY FULL TEXT

52.204-25 Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment (AUG 2019)

(a) Definitions. As used in this clause--

Covered foreign country means The People's Republic of China.

Covered telecommunications equipment or services means--

- (1) Telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities);
- (2) For the purpose of public safety, security of Government facilities, physical security surveillance of critical infrastructure, and other national security purposes, video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities);
- (3) Telecommunications or video surveillance services provided by such entities or using such equipment; or
- (4) Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, in consultation with the Director of National Intelligence or the Director of the Federal Bureau of Investigation, reasonably believes to be an entity owned or controlled by, or otherwise connected to, the government of a covered foreign country.

Critical technology means--

- (1) Defense articles or defense services included on the United States Munitions List set forth in the International Traffic in Arms Regulations under subchapter M of chapter I of title 22, Code of Federal Regulations;
- (2) Items included on the Commerce Control List set forth in Supplement No. 1 to part 774 of the Export Administration Regulations under subchapter C of chapter VII of title 15, Code of Federal Regulations, and controlled--
 - (i) Pursuant to multilateral regimes, including for reasons relating to national security, chemical and biological weapons proliferation, nuclear nonproliferation, or missile technology; or
 - (ii) For reasons relating to regional stability or surreptitious listening;
- (3) Specially designed and prepared nuclear equipment, parts and components, materials, software, and technology covered by part 810 of title 10, Code of Federal Regulations (relating to assistance to foreign atomic energy activities);
- (4) Nuclear facilities, equipment, and material covered by part 110 of title 10, Code of Federal Regulations (relating to export and import of nuclear equipment and material);

(5) Select agents and toxins covered by part 331 of title 7, Code of Federal Regulations, part 121 of title 9 of such Code, or part 73 of title 42 of such Code; or

(6) Emerging and foundational technologies controlled pursuant to section 1758 of the Export Control Reform Act of 2018 (50 U.S.C. 4817). Substantial or essential component means any component necessary for the proper function or performance of a piece of equipment, system, or service.

(b) Prohibition. Section 889(a)(1)(A) of the John S. McCain National Defense Authorization Act for Fiscal Year 2019 (Pub. L. 115-232) prohibits the head of an executive agency on or after August 13, 2019, from procuring or obtaining, or extending or renewing a contract to procure or obtain, any equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. The Contractor is prohibited from providing to the Government any equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system, unless an exception at paragraph (c) of this clause applies or the covered telecommunication equipment or services are covered by a waiver described in Federal Acquisition Regulation 4.2104.

(c) Exceptions. This clause does not prohibit contractors from providing--

(1) A service that connects to the facilities of a third-party, such as backhaul, roaming, or interconnection arrangements; or

(2) Telecommunications equipment that cannot route or redirect user data traffic or permit visibility into any user data or packets that such equipment transmits or otherwise handles.

(d) Reporting requirement. (1) In the event the Contractor identifies covered telecommunications equipment or services used as a substantial or essential component of any system, or as critical technology as part of any system, during contract performance, or the Contractor is notified of such by a subcontractor at any tier or by any other source, the Contractor shall report the information in paragraph (d)(2) of this clause to the Contracting Officer, unless elsewhere in this contract are established procedures for reporting the information; in the case of the Department of Defense, the Contractor shall report to the website at <https://dibnet.dod.mil>. For indefinite delivery contracts, the Contractor shall report to the Contracting Officer for the indefinite delivery contract and the Contracting Officer(s) for any affected order or, in the case of the Department of Defense, identify both the indefinite delivery contract and any affected orders in the report provided at <https://dibnet.dod.mil>.

(2) The Contractor shall report the following information pursuant to paragraph (d)(1) of this clause:

(i) Within one business day from the date of such identification or notification: The contract number; the order number(s), if applicable; supplier name; supplier unique entity identifier (if known); supplier Commercial and Government Entity (CAGE) code (if

known); brand; model number (original equipment manufacturer number, manufacturer part number, or wholesaler number); item description; and any readily available information about mitigation actions undertaken or recommended.

(ii) Within 10 business days of submitting the information in paragraph (d)(2)(i) of this clause: Any further available information about mitigation actions undertaken or recommended. In addition, the Contractor shall describe the efforts it undertook to

prevent use or submission of covered telecommunications equipment or services, and any additional efforts that will be incorporated to prevent future use or submission of covered telecommunications equipment or services.

(e) Subcontracts. The Contractor shall insert the substance of this clause, including this paragraph (e), in all subcontracts and other contractual instruments, including subcontracts for the acquisition of commercial items.

FAR 52.217-8 OPTION TO EXTEND SERVICES (NOV 1999)

The Government may require continued performance of any services within the limits and at the rates specified in the contract. These rates may be adjusted only as a result of revisions to prevailing labor rates provided by the Secretary of Labor. The option provision may be exercised more than once, but the total extension of performance hereunder shall not exceed six months. The CO may exercise the option by written notice to the Contractor within 30 days.
(End of clause)

FAR 52.217-9 OPTION TO EXTEND THE TERM OF THE CONTRACT (MAR 2000)

The Government may extend the term of this contract by written notice to the Contractor within 30 days; provided that the Government gives the Contractor a preliminary written notice of its intent to extend at least 30 days before the contract expires. The preliminary notice does not commit the Government to an extension.

If the Government exercises this option, the extended contract shall be considered to include this option clause.

The total duration of this contract, including the exercise of any options under this clause, shall not exceed 66 months

(End of clause)

8.2.1 PROHIBITED SOURCES

52.204-23 Prohibition on Contracting for Hardware, Software, and Services Developed or Provided by Kaspersky Lab and Other Covered Entities (Jul 2018)

(a) Definitions. As used in this clause—

“Covered article” means any hardware, software, or service that—

(1) Is developed or provided by a covered entity;

(2) Includes any hardware, software, or service developed or provided in whole or in part by a covered entity; or

(3) Contains components using any hardware or software developed in whole or in part by a covered entity.

“Covered entity” means—

(1) Kaspersky Lab;

(2) Any successor entity to Kaspersky Lab;

(3) Any entity that controls, is controlled by, or is under common control with Kaspersky Lab; or

(4) Any entity of which Kaspersky Lab has a majority ownership.

(b) Prohibition. Section 1634 of Division A of the National Defense Authorization Act for Fiscal Year 2018 (Pub. L. 115-91) prohibits Government use of any covered article. The Contractor is prohibited from—

(1) Providing any covered article that the Government will use on or after October 1, 2018; and

(2) Using any covered article on or after October 1, 2018, in the development of data or deliverables first produced in the performance of the contract.

(c) Reporting requirement.

(1) In the event the Contractor identifies a covered article provided to the Government during contract performance, or the Contractor is notified of such by a subcontractor at any tier or any other source, the Contractor shall report, in writing, to the Contracting Officer or, in the case of the Department of Defense, to the website at <https://dibnet.dod.mil>. For indefinite delivery contracts, the Contractor shall report to the Contracting Officer for the indefinite delivery contract and the Contracting Officer(s) for any affected order or, in the case of the Department of Defense, identify both the indefinite delivery contract and any affected orders in the report provided at <https://dibnet.dod.mil>.

(2) The Contractor shall report the following information pursuant to paragraph (c)(1) of this clause:

(i) Within 1 business day from the date of such identification or notification: the contract number; the order number(s), if applicable; supplier name; brand; model number (Original Equipment Manufacturer (OEM) number, manufacturer part number, or wholesaler number); item description; and any readily available information about mitigation actions undertaken or recommended.

(ii) Within 10 business days of submitting the report pursuant to paragraph (c)(1) of this clause: any further available information about mitigation actions undertaken or recommended. In addition, the Contractor shall describe the efforts it undertook to prevent use or submission of a covered article, any reasons that led to the use or submission of the covered article, and any additional efforts that will be incorporated to prevent future use or submission of covered articles.

(d) Subcontracts. The Contractor shall insert the substance of this clause, including this paragraph (d), in all subcontracts, including subcontracts for the acquisition of commercial items. (End of clause)

8.3 GENERAL SERVICES ADMINISTRATION ACQUISITION MANUAL (GSAM) CLAUSES INCORPORATED BY REFERENCE

The full text of a provision may be accessed electronically at the GSAM website:
<https://www.acquisition.gov/gsam/gsam.html>

GSAM	TITLE	DATE
552.204-9	Personal Identity Verification Requirements	OCT 2012
552.212-4	Contract Terms and Conditions—Commercial Items (FAR Deviation)	FEB 2018
552.232-25	Prompt Payment	NOV 2009
552.232-39	Unenforceability of Unauthorized Obligations (FAR Deviation)	JUL 2015
552.239-71	Security Requirements for Unclassified Information Technology Resources	JAN 2012

8.2.1 GSAM CLAUSES INCORPORATED BY FULL TEXT

552.204-70 Representation Regarding Certain Telecommunications and Video Surveillance Services or Equipment (DEVIATION I) (AUG 2019)

(a) Definitions. As used in this clause-

“Covered telecommunications equipment or services”, “Critical technology”, and “Substantial or essential component” have the meanings provided in FAR 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

(b) Prohibition. Section 889(a)(1)(A) of the John S. McCain National Defense Authorization Act for Fiscal Year 2019 (Pub. L. 115-232) prohibits the head of an executive agency on or after August 13, 2019, from procuring or obtaining, or extending or renewing a contract to procure or obtain, any equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. Contractors are not prohibited from providing-

(1) A service that connects to the facilities of a third-party, such as backhaul, roaming, or interconnection arrangements; or

(2) Telecommunications equipment that cannot route or redirect user data traffic or permit visibility into any user data or packets that such equipment transmits or otherwise handles.

(c) Representation. [Contractor to complete and submit to the Contracting Officer] The Vendor or Contractor represents that it [] will or [] will not provide covered telecommunications equipment or services to the Government in the performance of any contract, subcontract, order, or other contractual instrument resulting from this contract. This representation shall be provided as part of the proposal and resubmitted on an annual basis from the date of award.

(d) Disclosures. If the Vendor or Contractor has responded affirmatively to the representation in paragraph (c) of this clause, the Vendor or Contractor shall provide the following additional information to the Contracting Officer--

- (1) All covered telecommunications equipment and services offered or provided (include brand; model number, such as original equipment manufacturer (OEM) number, manufacturer part number, or wholesaler number; and item description, as applicable);
- (2) Explanation of the proposed use of covered telecommunications equipment and services and any factors relevant to determining if such use would be permissible under the prohibition in paragraph (b) of this provision;
- (3) For services, the entity providing the covered telecommunications services (include entity name, unique entity identifier, and Commercial and Government Entity (CAGE) code, if known); and
- (4) For equipment, the entity that produced the covered telecommunications equipment (include entity name, unique entity identifier, CAGE code, and whether the entity was the OEM or a distributor, if known).
(End of clause)

GSAM 552.212-71 CONTRACT TERMS AND CONDITIONS APPLICABLE TO GSA ACQUISITION OF COMMERCIAL ITEMS (MAY 2019)

(a) The Contractor agrees to comply with any clause that is incorporated herein by reference to implement agency policy applicable to acquisition of commercial items or components. The clause in effect based on the applicable regulation cited on the date the solicitation is issued applies unless otherwise stated herein. The clauses in paragraph (b) of this section are incorporated by reference:

552.203-71 Restriction on Advertising
552.215-71 Examination of Records by GSA (Multiple Award Schedule)
552.215-72 Price Adjustment—Failure to Provide Accurate Information
552.219-70 Allocation of Orders—Partially Set-Aside Items
552.229-70 Federal, State, and Local Taxes
552.232-23 Assignment of Claims
552.232-72 Final Payment
552.237-71 Qualifications of Employees
552.238-71 Submission and Distribution of Authorized FSS Schedule Price List
552.238-74 Industrial Funding Fee and Sales Reporting
552.238-75 Price Reductions
552.238-81 Modifications (Multiple Award Schedule)
552.242-70 Status Report of Orders and Shipments
(End of clause)

GSAM 552.238-115 Special Ordering Procedures for the Acquisition of Order-Level Materials (May 2019)

(a) Definition.

“Order-level materials” means supplies and/or services acquired in direct support of an individual task or delivery order placed against a Federal Supply Schedule (FSS) contract or FSS blanket purchase agreement (BPA), when the supplies and/or services are not known at the time of Schedule contract or FSS BPA award. The prices of order-level materials are not established in the FSS contract or FSS BPA. Order-level materials acquired following the procedures in paragraph (d) of this section are done so under the authority of the FSS program, pursuant to 41 U.S.C. 152(3), and are not open market items, which are discussed in FAR 8.402(f).

(b) FAR 8.403(b) provides that GSA may establish special ordering procedures for a particular FSS.

(c) The procedures in FAR subpart 8.4 apply to this contract, with the exceptions listed in this clause. If a requirement in this clause is inconsistent with FAR subpart 8.4, this clause takes precedence pursuant to FAR 8.403(b).

(d) Procedures for including order-level materials when placing an individual task or delivery order against an FSS contract or FSS BPA.

(1) The procedures discussed in FAR 8.402(f) do not apply when placing task and delivery orders that include order-level materials.

(2) Order-level materials are included in the definition of the term “material” in FAR clause 52.212-4 Alternate I, and therefore all provisions of FAR clause 52.212-4 Alternate I that apply to “materials” also apply to order-level materials. The ordering activity shall follow procedures under the Federal Travel Regulation and FAR Part 31 when order-level materials include travel.

(3) Order-level materials shall only be acquired in direct support of an individual task or delivery order and not as the primary basis or purpose of the order.

(4) The value of order-level materials in a task or delivery order, or the cumulative value of order-level materials in orders against an FSS BPA awarded under a FSS contract shall not exceed 33.33%.

(5) All order-level materials shall be placed under the Order-Level Materials SIN.

(6) Prior to the placement of an order that includes order-level materials, the Ordering Activity shall follow procedures in FAR 8.404(h).

(7) To support the price reasonableness of order-level materials—

(i) The contractor proposing order-level materials as part of a solution shall obtain a minimum of three quotes for each order-level material above the simplified acquisition threshold.

(A) One of these three quotes may include materials furnished by the contractor under FAR 52.212-4 Alt I (i)(1)(ii)(A).

(B) If the contractor cannot obtain three quotes, the contractor shall maintain its documentation of why three quotes could not be obtained to support their determination.

(C) A contractor with an approved purchasing system per FAR 44.3 shall instead follow its purchasing system requirement and is exempt from the requirements in paragraphs (d)(7)(i)(A)-(B) of this clause.

(ii) The Ordering Activity Contracting Officer must make a determination that prices for all order-level materials are fair and reasonable. The Ordering Activity Contracting Officer may base this determination on a comparison of the quotes received in response to the task or delivery order solicitation or other relevant pricing information available.

(iii) If indirect costs are approved per FAR 52.212-4(i)(1)(ii)(D)(2) Alternate I, the Ordering Activity Contracting Officer must make a determination that all indirect costs approved for payment are fair and reasonable. Supporting data shall be submitted in a form acceptable to the Ordering Activity Contracting Officer.

(8) Prior to an increase in the ceiling price of order-level materials, the Ordering Activity Contracting Officer shall follow the procedures at FAR 8.404(h)(3)(iv).

(9) In accordance with GSAR clause 552.238-83, Examination of Records by GSA, GSA has the authority to examine the Contractor's records for compliance with the pricing provisions in FAR clause 52.212-4 Alternate I, to include examination of any books, documents, papers, and records involving transactions related to the contract for overbillings, billing errors, and compliance with the IFF and the Sales Reporting clauses of the contract.

(10) OLMs are exempt from the following clauses:

(i) 552.216-70 Economic Price Adjustment - FSS Multiple Award Schedule Contracts.

(ii) 552.238-77 Submission and Distribution of Authorized FSS Schedule Pricelists.

(iii) 552.238-81 Price Reductions.

(11) Exceptions for travel. (i) Travel costs are governed by FAR 31.205-46 and therefore the requirements in paragraph (d)(7) do not apply to travel costs.

(ii) Travel costs do not count towards the 33.33% limitation described in paragraph (d)(4) of this section.

(iii) Travel costs are exempt from clause 552.238-80 Industrial Funding Fee and Sales Reporting.

(End of clause)

9.0 LIST OF ATTACHMENTS

The following attachments are attached, either in full text or electronically at the end of the RFQ.

ATTACHMENT	TITLE
A	SF 1449
B	PRICING WORKSHEET
C	PERFORMANCE WORK STATEMENT (PWS)
D	SIMILAR EXPERIENCE
E	KEY PERSONNEL QUALIFICATION MATRIX (KPQM)
F	PAST PERFORMANCE INFORMATION

10.0 REPRESENTATION PROVISIONS PROVIDED IN FULL TEXT

52.204-24 Representation Regarding Certain Telecommunications and Video Surveillance Services or Equipment (Dec 2019)

(a) *Definitions.* As used in this provision—

“Covered telecommunications equipment or services,” “Critical technology,” and “Substantial or essential component” have the meanings provided in clause 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

(b) *Prohibition.* Section 889(a)(1)(A) of the John S. McCain National Defense Authorization Act for Fiscal Year 2019 (Pub. L. 115-232) prohibits the head of an executive agency on or after August 13, 2019, from procuring or obtaining, or extending or renewing a contract to procure or obtain, any equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. Contractors are not prohibited from providing—

(1) A service that connects to the facilities of a third-party, such as backhaul, roaming, or interconnection arrangements; or

(2) Telecommunications equipment that cannot route or redirect user data traffic or permit visibility into any user data or packets that such equipment transmits or otherwise handles.

(c) *Representation.* The Offeror represents that—

It [] will, [] will not provide covered telecommunications equipment or services to the Government in the performance of any contract, subcontract, or other contractual instrument resulting from this solicitation.

(d) *Disclosures.* If the Offeror has responded affirmatively to the representation in paragraph (c) of this provision, the Offeror shall provide the following information as part of the offer

(1) All covered telecommunications equipment and services offered (include brand; model number, such as original equipment manufacturer (OEM) number, manufacturer part number, or wholesaler number; and item description, as applicable);

(2) Explanation of the proposed use of covered telecommunications equipment and services and any factors relevant to determining if such use would be permissible under the prohibition in paragraph (b) of this provision;

(3) For services, the entity providing the covered telecommunications services (include entity name, unique entity identifier, and Commercial and Government Entity (CAGE) code, if known); and

(4) For equipment, the entity that produced the covered telecommunications equipment (include entity name, unique entity identifier, CAGE code, and whether the entity was the OEM or a distributor, if known).

(End of provision)

FAR 52.204-26 Covered Telecommunications Equipment or Services Representation (Dec 2019)

(a) *Definitions.* As used in this provision, “covered telecommunications equipment or services” has the meaning provided in the clause [52.204-25](#), Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

(b) *Procedures.* The Offeror shall review the list of excluded parties in the System for Award Management (SAM) (<https://www.sam.gov>) for entities excluded from receiving federal awards for “covered telecommunications equipment or services”.

(c) *Representation.* The Offeror represents that it ☐ does, ☐ does not provide covered telecommunications equipment or services as a part of its offered products or services to the Government in the performance of any contract, subcontract, or other contractual instrument.
(End of provision)

General Services Administration (GSA)
Federal Acquisition Service (FAS)
Technology Transformation Services, Solutions (TTS - QQBC)

USAGov Contact Center Services
Performance Work Statement (PWS)

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1. INTRODUCTION

1.1 Background

GSA's Public Experience Portfolio/USAGov (formerly the Federal Citizen Information Center) is congressionally mandated to provide Government information to the public. Focused on connecting citizens with Government information and services, we deliver a high-quality experience to citizens—anytime, anywhere through a variety of delivery channels. We emphasize the customer experience and employ human-centered design techniques, such as journey mapping and usability testing, data/metrics, in everything we do.

The USAGov Program Office manages the USAGov Contact Center program which, along with the USA.gov and USAGov en español websites and social media presence, is core to an omnichannel approach to communication between the public and their Government. The contact center supports USA.gov, USAGov en español, and currently five Government agencies (herein referred to as Customer Agency programs) by answering the public's questions about Government information and services. The contact center is deemed a mission essential function by GSA, meaning the program is expected to remain operational during times of national crisis or other impediments to the normal operations of the federal government. The USAGov Contact Center currently responds to inquiries via telephone, email, and web chat¹, and is considering social-media engagement as well. It serves as the "voice of the government," helping citizens navigate and understand Government programs, services, and information. In FY2019, the Contact Center (CC) responded to over 530,000 calls, emails, and web chat inquiries from the public for both USAGov and our Customer Agency programs.

1.1.1 GSA's Vision for the USAGov Contact Center

The selected contractor (herein referred to as "Contractor") will provide the public with information pertaining to the government and its services. The Contractor will be a leader in the efficient, high-quality operation of Government contact centers and employ integrated contact channels such as telephone, email, chat, and potentially social media, while maintaining a consistently high customer experience across all. The Contractor's Customer Service Representatives (CSRs) will advise citizens, facilitating access to information, and answering questions using approved content and resources².

The Contractor must be a results-driven leader with a mature management framework to meet program objectives and deliver recommendations to continually improve operations, service to the public, and efficiency. The Contractor will be highly skilled in channel management, contact center operations, and state-of-the-art contact center technology solutions.

Additionally, the government recognizes that contact center operations and technologies are changing at a rapid pace. With new technologies such as natural language processing and robotic process automation, there are opportunities to answer questions and provide services quicker, cheaper, and better, while also offering new and exciting ways of analyzing the copious amount of data generated through citizen engagement. The Contractor must be setup to evolve and incorporate beneficial technological advancements over the length of the contract.

¹USAGov and our customer agency partners use a mixture of these channels, with each program defining their own specific channel requirements. Details for each program are included in Sections 1 and 2.

²Approved content and resources are specified for each customer agency and USA.gov/USAgov en español

1.1.2 Overview of Services

In FY 19, the Contact Center serviced USAGov, including USA.gov (in English) and USAGov en español (in Spanish). USAGov inquiries accounted for approximately 75% of the overall CC volume (see *Section 2.1.2 Attended Services* for details on historical volumes). In addition to USAGov inquiries, the CC supported four other Government agency programs (the aforementioned Customer Agency programs): Department of State (DOS), Food and Drug Administration (FDA), Fish and Wildlife Service (FWS), Login.gov.

Customer agency programs represented about 25% of the overall inquiries to the contact center in FY 19. Additionally, at the beginning of FY 20, the United States Department of Agriculture (USDA) agreed to become a new Customer Agency program with the potential of dramatically increasing the volume of calls, emails, and chats at the contact center. See the section on USDA's requirements for more details below. At the time of the writing of this PWS, we are still in the onboarding process with USDA and it is expected that service will begin for them at the time of this contract's award. Should Customer Agency programs require changes, in terms of which programs are supported and/or the support they require, the Contractor will adjust accordingly.

Additional information regarding historic volumes and hours of operation can be found in sections 2.1 *Services* and 5.3 *Hours of Operation*.

Program	Channels Leveraged		
	Phone	Email	Chat
USAGov	✓	✓ ³	✓
Department of State (DOS)	✓		
Food and Drug Administration (FDA)	✓		
Fish and Wildlife Service (FWS)	✓		
Login.gov	✓	✓	
United States Department of Agriculture (USDA)	✓	✓	✓

Additionally, the Contractor is responsible for program management of all Customer Agency programs as outlined in the Program Management section of the PWS (section 3). The Contractor must be able to support the current Customer Agency program workload with the ability to adjust to changes in workload, both in terms of the number of Customer Agency programs and volume.

³ Previously, USAGov had maintained email capabilities at the CC. However, in FY 2019 USAGov chose to remove the channel.

1.2 Objectives

Through this contract's Contractor-provided support, the government expects to achieve the following objectives:

- Provide the public with easily accessible, accurate, timely, and professional responses to inquiries about Government programs and services in English and Spanish, via their preferred channel of communication.
- Provide fully managed, omnichannel CC solutions to meet the needs of the general public, USAGov program and Customer Agency programs.
- Manage an agile, innovative workforce, such as geographically dispersed or remote workers.
- Apply modern methodologies and technologies to better serve the public.
- Facilitate data-driven decisions by tracking contact center market and technology trends while seeking and implementing innovative ideas.
- Assist the government's public response during emergencies, special circumstances, and in times when additional surge support is needed to quickly respond.
- Work with the USAGov Analytics Team to increase the government's capability to understand, measure, control, and improve the delivery of information services to meet the evolving needs of the public.
- Manage the CC program for budget sustainability by identifying, piloting, and implementing cost-reduction opportunities.
- Meet current and evolving government information systems and personnel security requirements (National Institute of Standards and Technology [NIST] SP 800-37, 800-53, etc., and GSA IT security requirements, such as FedRAMP for cloud-based services).
- Improve the customer experience and operational efficiency of the USAGov contact center.
- Institutionalize innovation and continuous improvement including new capabilities, features, and emerging technologies (e.g., AI-based tools).
- Improve operational flexibility by creating an environment to efficiently and effectively integrate new capabilities and features.
- Efficiently manage each customer contact regardless of channel, providing world-class customer service.
- Maintain a consistently positive public experience.
- Employ an agile, innovative workspace consistent with [Technology Transformation Services' \(TTS's\) mission and objectives](#).
- Maintain budget sustainability by, in part, actively looking for—and suggesting ways to—reduce costs while maintaining or improving quality.
- Potentially serve as a short-term emergency contact center to support other Federal agency programs.

1.3 Scope Of Work

The government seeks continued support for its multilingual omnichannel contact center to support the various programs as described in this PWS.

The contractor will:

- Provide a wide range of automated (IVR, etc...) and attended (CSRs taking calls, etc...) customer support services to respond to inquiries about Federal Government programs, policies, information sources and agencies from the general public, Congressional offices, business and professional communities, academia, Government offices, and electronic and print media.
- Provide all necessary personnel, training, supervision, administrative support, and management for CC operations.
- Provide all direct program management for each customer agency (see *Section 3.0 Program Management* for more details)
- Furnish required facilities and infrastructure, with either co-located or virtual personnel, equipment, supplies, and services, as required, to meet the requirements of the government.
- Provide required project support to analyze, plan, design, implement, operate, and manage special customer support services that may be needed to meet the diverse needs of the government.
- Develop and implement a quality assurance program.
- Implement initial and on-going training for all CC staff, and evaluate training outcomes to enhance the training program. This may include, as requested by the government, to develop, maintain, and deliver training with supporting materials and job aids for new features or services, including the addition of new customer agency programs, to ensure staff readiness to answer questions from the public.
- Identify cost-savings opportunities, analysis, and periodic review of overall work objectives to discuss suggestions for improvements and changes with the government.
- Assess and implement new technological solutions, including holding a technology review in the second year of the contract and annually thereafter. Propose innovation pilots for possible implementation through the life of the contract.
- Develop, execute, and keep updated a post-award transition plan including schedule and interface points with the incumbent contractor, GSA, and Customer Agency programs, to maintain high quality service during the start-up and the shut-down of this contact center contract. The initial version of this plan will be submitted as part of the response to this PWS.
- Comply with Federal information systems security requirements established in Federal Information Security Management Act of 2002 (FISMA) and GSA as the government's requirements evolve (NIST SP 800-37, 800-53, etc.).
- Provide timely access to a backup solution that supports 24 hours a day, 7 days a week, operations to ensure continuity of operation in case of system failure, service outage, and/or disaster.
- Provide timely access to surge capacity in response to large volumes of calls, email, or chat resulting from emergencies or significant events that affect or have the potential to affect the CC supported programs.

- Provide emergency support services when required for additional customer agencies.
- Provide additional solutions to enhance the CC program. These may include, but are not limited to, the following examples:
 - Expand or provide additional support for new services or initiatives described in this PWS.
 - Add additional channels of communication to Customer Agency programs.
 - Add additional languages to Customer Agency programs.
 - Extend the hours or days of operation for live attended service to include nights, Saturdays, Sundays, and Federal Holidays if necessary.
 - Adjust support to meet Federal information systems security requirements for low or high-risk systems.
 - Provide special project support as needed to analyze, plan, design, implement, operate and manage special customer support services that may be needed to meet the evolving needs of the government.
- Provide all plans and reports outlined in *Section 3.6 Reporting* and *Section 4.0 Deliverables*.
- Analyze the data generated by the contact center to determine usage patterns with a goal of improving customer experience and efficiency. Present findings to the government and share relevant datasets with the government.

2. GENERAL PROGRAM REQUIREMENTS

2.1 Services

Currently, USA.gov operates the contact center via two servicing models:

1. A shared service model. This model is based on firm fixed price volume bands for normal business hours service, where all customer agencies' volumes are added together to determine which band the month's volume falls in. Currently, USA.gov, USA.gov en espanol, the Department of State (for non-emergency service), and the Fish and Wildlife Service are serviced via the shared service model. Additionally, in cases of surge support being required, the government may authorize as part of a surge strategy the use of overtime for CSRs and SCSRs.
2. A time and materials model. This model is based on hourly rates for CSRs and SCSRs that are dedicated to the customer agency. Login.gov, the Food and Drug Administration, and emergency support for the Department of State are currently serviced via the time and materials model due to their unique requirements (higher average AHT, requirements to work beyond normal business hours, and/or requiring a customer agency-provided CRM). Additionally, under the current model, it is assumed that the United States Department of Agriculture would join the program under the time and materials model.

The government is interested in increasing the usage of the shared service model if it can be done in such a way as to minimize risk to per-transaction costs and/or the quality of the customer experience and invites Contractors to offer innovative solutions that can accomplish this goal.

2.1.1 Current Services Provided

The government may add and adjust in-scope services to meet the evolving needs of the citizens and agency programs, including adding or removing customer agencies as needs arise. Any additions will be via bilateral modifications to the contract agreed upon by both the government and the Contractor.

Information related to reporting requirements can be found in section 3.6 *Reporting*. The Contractor is responsible for updating the FY telephone summary reports daily and for uploading other reports into Salesforce (e.g. monthly narrative report), and into the Salesforce web-based Customer Agency portal.

The current services required for USA.gov, USAGov en español, and our current customer agency partners are described below.

USA.gov and USAGov en español

Description: The CC responds to questions about Federal Government agencies, programs, benefits, and services providing support for USA.gov (in English) and USAGov en español (in Spanish). Popular topics of inquiry are about Government grants and loans, taxes, social security, travel, immigration and naturalization, and consumer issues including consumer complaints, recalls, and scams. More information about USA.gov the website is available at <https://www.usa.gov/>.

USA.gov and USAGov en español receive inquiries of varying complexity; some require simple referrals to contact information (phone number, website URLs), while others require research to find a specific answer, process, referral, or service. The CSR must often walk customers through steps in a process, such as how to apply for a passport, or perform extensive research to find a specific answer to a question.

GSA recently launched a self-service chatbot on the USA.gov website to assist customers with frequently asked questions about popular topics like scams and voting. Due to the technical limitations of the current chatbot service, the chatbot is not yet integrated with the contact center, i.e. customers cannot opt out of the chatbot to chat/speak with a live agent, but the government may select a new chatbot service in the future that offers additional capabilities for expansion and integration.

The USAGov Content Team writes content for both the website and the contact center. USAGov follows a Create Once Publish Everywhere (COPE) content model to reduce duplicative effort and ensure consistent information is delivered across all channels. Content is created in a central Content Management System (CMS), published to the web, and then the same content is synced nightly with the Salesforce knowledge base via API.

Services Provided: The CC operates both telephone (844-872-4681, 800-333-4636, and 202-208-1576) and chat services for USA.gov (in English) and USAGov en español (in Spanish), which is open between 8:00 am and 8:00 pm Eastern Time Monday through Friday and when required on special circumstances for extended hours (see special requirements below). Previously, USAGov also maintained email capabilities at the CC, however in FY 2019, USAGov removed the email channel. In the future, USAGov may choose to offer email in English and Spanish.

Special Requirements: In response to specific needs or emergencies, the government may extend the hours of operation of the General Public Inquiry program to include nights, Saturdays and Sundays, and/or Federal holidays. The Contractor will provide options to staff the CC during such situations as required by the government. The government may direct the Contractor to staff the contact center either by specified daily work volume or defined daily staffing level. The Contractor will provide the required support within 3 hours of notification, when requested by the government. If the customer selects the wrong language (e.g. Spanish-speaking customer chooses English in the IVR), the contractor will ensure that the CSRs have the ability to transfer callers to the USAGov Spanish queue and from the USAGov Spanish queue to the USAGov English queue.

FY 2019 Historical Data:

- Telephone Volume (English): 244,029

- Telephone Volume (Spanish): 20,859
- Telephone AHT (English): 3:39
- Telephone AHT (Spanish): 4:23
- Chat AHT (English): 6:46
- Chat AHT (Spanish): 5:50
- Telephone ASA English: 16 seconds
- Telephone ASA Spanish: 21 seconds

Department of State (DOS), Overseas Citizen Services (OCS)

Description: The Department of State's Overseas Citizen Services (OCS) works with U.S. Embassies and Consulates around the world to protect Americans. Common topics of inquiry include emergencies abroad, child abductions, international adoptions, international travel, visas, and services to U.S. citizens overseas. Some inquiries in addition to using the Salesforce knowledge base may require searching the www.travel.state.gov website for the appropriate response/referral. Passport calls are referred to the National Passport Information Center (NPIC) hotline, which is a separate DOS contact center. More information about OCS is available at www.travel.state.gov/.

Services Provided: The CC operates the Emergency Response Hotline for OCS, which is open between 8:00 am and 8:00 pm Monday through Friday and closed on weekends and Federal Holidays. As described in the special requirements section below, in emergency situations the CC may be required to operate after normal business hours. The CC only responds to telephone English inquiries only for OCS.

At the time of writing this, OCS is considering the best way to handle inquiries in Spanish and perhaps other languages. The use of a language service or perhaps an IVR change may be in place by the time of the award. The number is 1-888-407-4747 for callers in the U.S and Canada and 202-501-4444 for callers in other countries. Each inquiry is documented in Salesforce and content to answer OCS inquiries is found by accessing a spreadsheet for inquiry guidance, Salesforce, and the Department of State website, www.travel.state.gov. All inquiry transfers to country officers require that the CSR use a warm transfer procedure and an explain the nature of the inquiry prior to completing the warm transfer.

Special Requirements: In emergency situations, the CC may be asked to operate after normal business hours, and/or provide periodic call volume ad hoc reports to the DOS POC. The CC may be required to provide expanded support up to 24 hours a day, 7 days a week, including updates to the IVR emergency message(s) and call response coverage for U.S. citizens from around the world within three hours of receiving notification, IVR script and talking points from the Department of State. In such instances, OCS may ask the CC to collect caller information, such as name, dates of travel, travel locations, etc. for entry into a national registry maintained by DOS. Access to the national registry will be available through a website maintained by DOS.

Calls during such an event, require separate volume tracking and sending the POC periodic volume and inquiry types.

Over the past five years, there were eight emergency situations that required the CC to expand normal hours of operation including: demonstrations in Haiti and South Sudan, bombings in Istanbul, Brussel, and Paris, a hurricane in Mexico, civil war unrest in Yemen, and an earthquake in Nepal. Additionally, DOS has requested the monitoring of multiple non-emergency situations. This involves ad hoc reports provided by the CC for as long as the situation is active (e.g., two days, ten days, two weeks). The contractor also must be prepared to provide the call volumes for a Current Affairs topic every 4 hours or as directed by DOS. Ad hoc reports minimally are required M-F (every 4 hours).

To ensure DOS inquiries are answered accurately and thoroughly, the government does not mandate, but highly recommends that only a subset of the CSR staff are skilled to handle DOS calls, especially at the beginning of the contract. This will ensure that even though the DOS call volume is low, the DOS-skilled CSRs will receive enough calls to master the DOS content, terminology, and procedures.

FY 2019 Historical Data:

- Phone Volume: 63,447
- Phone AHT: 5:00
- Phone ASA: 10 Seconds

Department of the Interior (DOI), Fish and Wildlife Service (FWS)

Description: FWS is one of eight primary bureaus that make up the DOI. FWS helps protect a healthy environment for people, fish, and wildlife, and helps Americans conserve and enjoy the outdoors and our living treasures. The most common topics of inquiry are permits, injured/nuisance animals, wildlife issues, hunting/fishing licenses, wildlife refuges, and endangered species. More information about FWS is available at www.fws.gov.

For FWS, the CSRs use GSA's Salesforce as the CRM solution. The CSR finds answers to inquiries by searching the FWS federal, state and local websites. They also use the Salesforce knowledge base to reference program-specific procedures.

Services Provided: The CC operates telephone service for FWS, which is open between 8:00 am and 8:00 pm Monday through Friday. The CC only responds to telephone inquiries in English for FWS; the telephone number is 1-800-344-WILD (9453). All inquiry transfers to tier 2 require that the CSR use a warm transfer procedure and explain the nature of the inquiry prior to completing the warm transfer.

Special Requirements: To ensure FWS inquiries are answered accurately and thoroughly, the government does not mandate, but highly recommends that only a subset of the CSR staff are skilled to handle FWS calls, especially at the beginning of the contract. This will ensure that even though the FWS call volume is low, the FWS-skilled CSRs will receive enough calls to master the FWS content, terminology, and procedures.

FY 2019 Historical Data:

- Phone Volume: 9,400
- Phone AHT: 4:01
- Phone ASA: 11 seconds

Department of Health & Human Services (HHS) Food & Drug Administration (FDA)

Description: The CC operates the FDA Emergency Call Center 24 hours a day, 365 days a year. The government specifies the number of CSRs and the number of Supervisory CSRs. In FY19, the government requested 1 CSR and 1 Supervisory CSR covering all hours of operation. The contractor determines how to staff to meet this requirement. Calls involve inquiries related to experimental drug use, drug interactions and side effects, food safety issues such as spoiled and outdated food products and illnesses, tampering of food items, baby formula concerns, and questions about medical devices. FDA-related calls may originate from multiple audiences including health care providers, local/state health departments, other government agencies including senior FDA personnel or other FDA personnel requiring immediate assistance, and the general public. All inquiry transfers to the duty officer require that the CSR use a warm transfer procedure and explain the nature of the inquiry prior to completing the warm transfer. More information about the FDA can be found at www.fda.gov.

Services Provided: The Contractor will staff the FDA program 24 hours per day including weekends and Federal holidays. The CC responds to telephone inquiries for the FDA After-hours Emergency Call Center; the telephone number is 866-300-4374. FDA leverages the language line to respond to customers with limited English proficiency. FDA provides their own CRM (EON) system. As a back-up, Salesforce can be used to document each inquiry. Content for inquiry handling is provided by FDA in a Word document. The contractor updates the Word document to list categories and link to the appropriate area within the document.

Special Requirements: Occasionally, FDA requires support for surges in call volume resulting from emergencies or significant events affecting FDA-regulated products or industries such as a foodborne illness/outbreak, natural disaster, terrorist event, or other issue of large scope related to an FDA-regulated product.

- **Surge Support:** Within two hours of notification by the FDA, the Contractor will collaborate with the FDA and the government to jointly develop a suitable and timely solution to meet the FDA's surge requirement on a case by case basis.
- **FDA Quality:** In addition to meeting the basic quality score card, the FDA has an additional requirement. The FDA POC will daily review 100% of the FDA calls for accuracy of the referral or the use of the escalation procedure. Additionally, the FDA POC will evaluate the data collected for accuracy. The FDA requires that 98% of the calls meet a pass/fail each month.
 - The contractor will use an Excel spreadsheet (to be provided at award) to track all of the feedback provided by the FDA. A sample of this spreadsheet is included in *Appendix 5, Quality Report: Measurement Forms and Definitions*.
- **FDA CRM:** The CSRs access a FDA provided CRM solution (EON) to record detailed data for each inquiry. In situations when EON is not available, the contractor will use the FDA Salesforce form within the GSA's Salesforce console to log details for each inquiry and once EON becomes available, the contractor will enter these cases into EON.
- **Language Line Services:** The Contractor must provide language-line services to assist in responding to callers with limited English proficiency. In FY19, FDA used 3,170 minutes on the language line. More information on what is required for language line services can be found in *Section 2.1.5 Other Support Services*.

FY 2019 Historical Data:

- Phone Volume: 26,300
- Phone AHT: 2:00
- Phone ASA: 9 seconds

General Services Administration (GSA), Login.gov

Description: Login.gov offers the public secure and private online access to participating Government programs. With one login.gov account, users can sign in to multiple Government agencies. The goal is to make managing Federal benefits, services, and applications easier and more secure. Common topics of inquiry include issues with passwords, initial password setup, escalating website issues, and questions about how to use the Login.gov platform; more information can be found at <https://login.gov/>.

Services Provided: The CC provides telephone (844-875-6446) and email response for Login.gov Monday - Friday from 8am - 8pm EST. Login specifies the number of CSRs and the number of Supervisory CSRs. In FY19, Login requested 10 CSR and 2 Supervisory CSR covering all hours of operation. Most Login.gov customers send inquiries via email. Customers and CSRs go back and forth during email inquiries until the issue is resolved. CSRs use a GSA-provided Salesforce instance as the Customer Relationship Management (CRM) tool to record customer information, but it is customized specifically for this program. The most common types of inquiries for the contact center include agency specific referrals, basic account questions and technical research questions. The contact center is currently staffed with ten CSRs and three Supervisory CSRs.

Special Requirements: The Contractor should note that Login.gov is onboarding additional Government programs who will have access to Login.gov's service offerings. Login.gov is a newly launched shared service to provide identity verification and credential management for the public when accessing secured Government systems. GSA is actively marketing the service and expects increasing adoption across the government. This growth has the potential to dramatically increase the volume of calls and emails for Login.gov during the period of performance of this contract. Should this level of growth occur, the government would engage the Contractor to ensure support levels are increased commensurate with the volume growth. It is expected that the Contractor will assist the government in developing potential staffing plans to meet current and planned future demand. The government is responsible for setting staffing levels and approving any changes.

The Contractor must provide language line services in Spanish and French for both voice and email. In FY 2019, Login.gov used 307 minutes on the language line. More information on required language line services can be found in *Section 2.1.5 Other Support Services*.

FY 2019 Historical Data:

- Phone Volume: 10,690
- Email Volume: 94,573
- Phone AHT: 9:59
- Phone ASA: 8 seconds

United States Department of Agriculture (USDA) AskUSDA Consolidated Contact Center

Description: At the time of the writing of the PWS, USDA is planning to have the CC manage their new AskUSDA program. This program consolidates existing USDA contact centers into one place while offering these services via a single phone number for USDA customers. The intent is to make it easy for the public to interact with the USDA and enable information from across their organization to be accessed in one place. The USDA provides leadership on food, agriculture, natural resources, rural development, nutrition, and related issues based on public policy, the best available science, and effective management.

The USDA's vision is to provide economic opportunity through innovation, helping rural America to thrive; to promote agriculture production that better nourishes Americans while also helping feed others throughout the world; and to preserve our Nation's natural resources through conservation, restored forests, improved watersheds, and healthy private working lands. The AskUSDA program plans to serve as the first point of contact for the public to find answers to their questions.

Set Up/System Access: As of the writing of the PWS, USDA is planning to use a Citrix application that would connect the CC CSRs to the USDA Jabber phone system. This would allow USDA to use their own

telecommunications system for delivering calls to the CC CSRs and allow for warm call transfers to the appropriate internal escalation point. The USDA uses their own Salesforce CRM to capture data from each inquiry. Onboarding of USDA as a customer agency is to be handled as an optional FFP task under CLIN 80003.

Services Provided: The CC provides Tier 1 service in both English and Spanish Monday - Friday 8a - 8p Eastern Time for ASKUSDA. The channels supported are:

- Telephone
- Email
- Web chat
- Webform (emails generated from an email on the main website)

Staffing: The contractor will be responsible for hiring a sufficient number of CSRs to meet the USDA goals for this consolidation and to work with the USDA POC to manage the staffing, workforce management, and the quality/performance of the CSRs. The contractor will work with the USDA Security team to complete the necessary forms, fingerprinting, and screening for this program. At the time of writing this PWS, it is believed the CSRs will require a Tier 1 security clearance.

The expected volume during the base period of this contract for MyUSDA will be:

Approximate Inquiry Volume	Oct. 2020	Nov. 2020	Dec. 2020
Phone (English)	10,600	10,600	10,600
Email/Webform (English)	5,060	5,060	5,060
Chat (English)	1,840	1,840	1,840
Phone (Spanish)	1,000	1,000	1,000
Email/Webform (Spanish)	440	440	440
Chat (Spanish)	160	160	160

It is expected that in future option periods of this contract, USDA will continue to consolidate, adding more programs to AskUSDA. The expected volumes by channel after the consolidation is complete are expected to be 5 to 7 times the volume expected during the base period. As explained above, the contractor will be responsible to work with the USDA POC and contract COR to manage increased volumes due to continuing consolidation efforts.

The chart provides the service metrics required for the AskUSDA program. USDA has expressed a desire for shorter AHT - their goal is to bring AHT down to 3:00/inquiry

Channel	Service Level	ASA	Abandon Rate	AHT
Phone	80% Answered in 60 seconds	<= 30 seconds	<=5%	4:30
Chat	80% Answered in 60 seconds	<= 30 seconds	<=5%	Time - 4:38
Email	98% Resolved 1 Bus Day 100% Resolved 2 Business Days	NA	NA	4:38

The contractor will provide in their proposal the most efficient setup and pricing method to meet the USDA goals and describe how this team will be merged into the rest of the CC program.

2.1.2 Attended Services (CLIN Series 40000–50000)

The contractor will provide accurate, timely, complete, and courteous responses to all customer inquiries. The contractor will provide qualified staff to support the work types identified in the PWS. Qualified staff can work remotely so long as they are able to fulfill all of the service requirements. Specific services include, but are not limited to:

- Inbound Telephone Inquiries
- Interactive Web Based Services, such as responding to web chat, email, and social media inquiries

Historical volumes for telephone by program are shown in the table below.

Program	Language	Answered Call Volume			
		FY 2016	FY 2017	FY 2018	FY 2019
USA.gov (844) 872-4681 (800) FED-INFO = (800) 333-4636 (800) 688-9889	English	344,640	287,613	284,270	244,029

(202) 208-1576					
USAGov en español (844) 872-4681 (800) FED-INFO = (800) 333-4636 (800) 688-9889 (202) 208-1576	Spanish	22,674	20,324	17,736	20,859
DOS-OCs (888) 407-4747; (202) 501-4444	English	81,917	76,180	70,012	63,477
DOI-FWS (800) 344-WILD = (800) 344-9453	English	16,167	13,090	11,604	9,400
HHS-FDA (866) 300-4374	English (Language Line)	15,057	22,180	17,855	26,300
Login.gov (844) USLOGIN = 844-875-6446	English	N/A	328 ⁴	28,899	10,690 ⁵
Total		480,455	419,715	430,376	374,755

Historical volumes for chat and email by program are shown in the table below.

Web Based Services Volume						
Program	Channel	Language	FY 2016	FY 2017	FY 2018	FY 2019
Chat						
USA.gov	Chat	English	36,400	47,043	48,390	46,351
USAGov en español	Chat	Spanish	7,554	8,402	8,779	10,569

⁴ Login.gov FY17 only includes calls from July, August, and September

⁵ Login.gov stopped publishing their phone number in FY 2019 as they transitioned their primary support channel to email. Should Login elect to republish the phone number, the government will coordinate the change with the Contractor.

Total Chat			43,954	55,445	57,169	56,920
Email						
Login.gov	Email	English	N/A	N/A	78,296	87,593 Cases 94,573 Sent Emails

Interactive Voice Response (IVR) Services (Optional CLIN Series 90001)

Currently, the government provides the incumbent contractor telecommunications services, including a cloud-based IVR solution. Currently, three network IVRs are supported using numeric prompt technology provided by our telecommunications provider under the Verizon Network contract. Our IVRs are scalable, and the largest of the three plays on average over 200,000 messages per month. The IVRs allow for multiple entry points, support multiple languages (currently English and Spanish), and offer take-back and transfer capabilities. Professional voice talent is provided for the recording of audio scripts for languages supported. Currently, the government receives telecommunications reporting in several different formats. Daily and monthly IVR and toll-free traffic reporting are delivered via automated email. The government also has the capability to access the service provider's web portal to obtain on-demand reports or customized reporting as needed. Additionally, the government accesses the service provider's file transfer protocol (FTP) site to download monthly call records for three of the Toll Free/IVR services.

The Contractor under this procurement may continue to utilize a Government-provided IVR solution or propose its own IVR solution.

If the Contractor offers its own IVR, it will:

- Offer IVR services—automated recorded messages in English and Spanish, with scalable capacity.
- Provide IVR service 24 hours a day, 7 days a week.
- Be responsible for the provision, maintenance, implementation, operation, and management of the IVR(s) for current and future customer agencies. The government shall maintain control over the content and design of the IVR.
- Provide options for IVR operations for Government selection, such as the use of touch-tone pad or simple voice command recognition technology, such as “say or press” options.
- Include the following options with the recorded message:
 - Option to select the message from the agency about the particular issue.
 - Option after the message to end the call.
 - Option to be transferred back into call flow for the next available CSR.
 - Option to be transferred directly to the next available CSR.
 - Requirement for the user to be forced to hear the complete message before being able to proceed with a menu selection. This should include ensuring the user can't press a button to end the message and be transferred to a CSR or during an invalid/timeout error state.
- Maintain separate IVR call flow diagrams for each program. Upload each file to a GSA Google shared folder for the client's review and viewing.

- Provide professional voice talent to record new IVR messages in English and Spanish.
- Provide government clients/staff with a self-service option to remotely re-record already activated messages as needed.
- Make available IVR usage reports as described in the 3.6 Reporting section of this PWS.

Regardless of the IVR service proposed, the Contractor will provide program management support to meet these IVR needs:

- Record additional IVR messages during times of emergency.
- Activate and deactivate approved message(s) within 30 minutes of notification by the government.
- Implement changes to the IVR menu and message structures or recorded messages within two business days, except for Customer Agency emergency IVR support, upon request by the government.

Email

Currently only Login.gov requires email response. See section 2.1.2 *Attended Services* for Login.gov email volumes. In the future, the government may implement English- and Spanish-language email capabilities for USA.gov or other Customer Agency programs whereby CSRs exchange multiple emails with a customer. CSRs responding to emails are required to have a writing proficiency equivalent to that of an educated native writer.

Previously, USA.gov had maintained email capabilities at the CC. However, in FY 2019 USA.gov chose to remove the channel. Historical volumes and response time by language are shown in the table below:

		Email Volume		
Program	Language	FY 2016	FY 2017	FY 2018
USA.gov	English	26,482	27,033	26,482
USA.gov en español	Spanish	6,750	6,674	6,674
Total		33,232	33,707	33,156
		Email Response Time FY 2018		
USA.gov	English	99% in 4 hours L1 SL 1% in 24 hours L2 SL		
USA.gov en español	Spanish	99% in 4 hours L1 SL 1% in 24 hours L2 SL		

Social Media

In the future, the Contractor may be required to support social media response communications to interact and engage with customers in real time and monitor social media for questions. The

government will provide content for CSRs to respond to questions on social media. The Contractor, as part of its talent-management program, will be responsible for training CSRs in the use of the social media CRM as well as training CSRs in how to respond appropriately to the public via written social media communications. CSRs would need to have complete fluency in the language including breadth of vocabulary and idiom, colloquialism, and pertinent cultural references. KPIs to measure performance will be agreed upon by the government and the Contractor at the time that the option is exercised. Potential KPIs that the government may examine are customer satisfaction, average speed to respond, response rate, quality, average handle time, and engagement.

2.1.3 Telecommunication Services (Optional CLIN Series 80000)

The government may furnish its own toll-free telephone number(s) for use by the Contractor or request the Contractor provide the toll-free telephone number.

Currently, the government provides the incumbent contractor with the following telecommunications services:

- Telecommunications connectivity in the form of a DS3 circuit from Verizon, divided into trunks to support customer agency needs and provide isolation between the toll-free numbers supported by the program. Additionally, overflow trunks are available via ATB routing.
- A cloud-based IVR solution from Verizon, as described earlier in this PWS.

Offerors may propose solutions that rely on these services or propose their own solutions that meet the requirements and KPIs of this PWS. For example, the government welcomes quotes with cost-effective, integrated solutions that combine telecommunications elements to meet GSA's mission need, such as cloud-based VoIP solutions, compared to the plain old telephone service (POTS) solution the government currently provides. Should the Contractor elect to use Government-provided telecommunications backbone interconnects, they must support future transitions required by the government, such as switching to VoIP connectivity from POTS.

Regardless of the telecommunications proposed, the contractor will:

- Provide domestic and international toll-free services with nationwide single-number coverage and call-routing features (e.g. time-of-day and day-of-week routing, percent-allocation routing, alternate routing, and area code routing).
- Call termination features (e.g. call transfer, dialed number identification service [DNIS]).
- Automatic number identification (ANI).
- Outbound domestic local and long-distance telephone service.
- Call detail and management reports.
- Telephony system to receive calls at the delivery point within the CC. This can be accomplished by Automatic Call Distributor (ACD), Private Branch Exchange (PBX) or other technology capable of call queuing and routing. If multiple locations or facilities are used to support the contract, the contractor will provide the solution and support to distribute the inbound calls.
- Support troubleshooting for any telecommunications issues that may arise including submitting and following up on support tickets if required to the telecommunications provider.
- The system will be DNIS-enabled, in order to distinguish incoming calls by the called number and route them to the appropriate response system and/or CSR. The system will be capable of

providing the appropriate program identification (e.g., via whisper announcement) at the CSR workstation.

- If applicable:
 - Provide DNIS values to the government's telecommunication provider to terminate inbound calls.
 - Provide telecommunications access between the government service provider's points of presence and Contractor's telecommunications demarcation point (including the installation of telecommunication service).
 - Provide a network cloud-based IVR that routes calls to the CC using hidden toll-free phone numbers and Dialed Number Identification Service (DNIS) values.
 - Provide the location where the telecommunication access from the government will terminate, including physical address and commercial phone number associated with the location.
 - Provide dedicated transmission services and support of the services between contractor facilities, if multiple locations are utilized.
- Provide access to the Internet from Contractor locations for use by all CSRs and other contractor-provided staff.
- Capability to warm transfer contacts to appropriate tier 2 contacts as specified by escalation SOPs, as well as to track the quantity and duration of warm contact transfers. These transfers may be activated automatically by the caller or manually through the CSR. Additionally, for programs that offer bilingual service, the contractor must be able to transfer a customer to the Spanish queue and from the Spanish queue to the English queue. This is to help efficiently facilitate customers who select the wrong language to get assistance.
- In the future, potentially offer the capability to warm transfer customers to appropriate tier 2 contacts at specified agencies that we handle frequent questions for.
- The contractor will expedite the transfer of all toll-free telephone number(s) used to support tasks issued under this contract to the government at the conclusion of the contract.

2.1.5 Other Support Services

The contractor will support the following additional services.

Language Line & Translation Service (CLIN Series 70000)

The contractor will provide consistent and immediate 24 hours a day, seven days a week access to a professional language line service from a recognized commercial source to assist in responding to callers with limited English proficiency to support Customer Agency programs. Currently, only FDA and Login.gov leverage the language lines and translation services. In FY 2019, 3,477 minutes were used on the language line between FDA (91%) and Login.gov (9%).

2.1.6 Ongoing Technology Reviews and Innovation Pilots (CLIN Series 80002)

The government seeks to apply modern methodologies and technologies to better serve the public and improve the cost efficiency of the contact center. In keeping with this objective, the Contractor will foster a culture of effective innovation and enable the making of data-driven decisions by tracking

contact center market and technology trends and seeking to implement innovative ideas throughout the life of the contract. To ensure that this objective is met, The contractor will:

- Hold a technology review with the government in the second year of the contract.
- Continue to hold technology reviews annually after the second year.

Technology reviews are considered part of program management and will not be separately reimbursed.

Moreover, throughout the contract period of performance, the Contractor must propose innovations in technology, business processes, or economies of scale that meet one or more of the following objectives:

- Improve the customer experience.
- Improve the efficiency of operations.
- Support future phases of USAGov contact center modernization.

These innovations could be in areas such as data analytics, channel integration, self-service options, or new channel offerings, just as examples.

The Contractor must incorporate innovations that are agreed upon by the government throughout the course of the contract including, for example:

- “Pilot” projects that evaluate use cases for the potential adoption of technical tools, business process re-engineering initiatives, and operations and staff development enhancements.
- Planned upgrades in technology.
- Operational improvements.
- Benchmarking with appropriate Federal and commercial organizations.

The Contractor must propose an approach to implementing pilot innovation projects. The Contractor’s pilot project proposals must:

- Define the use case for the pilot project.
- Identify goals of the pilot project.
- Outline how will success be determined (i.e., success measures and benchmarks).
- If applicable to the pilot, propose a test pool of contacts.
- Propose a timeline for the pilot project.
- Describe the methodology for testing the use case.
- Describe the feedback mechanism used to track and measure performance against the outlined goal.
- Estimate costs, which are not to exceed \$200,000 for any one pilot project, without explicit prior approval from the government.
- For successful pilots, describe a high-level approach for incorporating it in ongoing operations.

The Contractor must provide two potential pilot ideas as part of their proposal for this solicitation. The timing of pilot projects may occur at any time within the period of performance, with agreement from the Contractor and the government regarding the time frame, price, and scope.

3. PROGRAM MANAGEMENT (CLIN Series 30000)

The government is committed to continually improving the public's experience interacting with the Contractor through effective program management and technological innovation. The Contractor will manage the entire contact center program, including providing all required technical and management services to support all CC activities. This includes the development and maintenance of all relevant business rules, plans, tools, methodologies and procedures, and reports to ensure the required services are delivered in accordance with the key performance indicators and schedule specified in sections 3.1 *Performance Management* and 4.0 *Deliverables*. ***The contractor will serve as the primary point of contact and program office to the government, including all Customer Agency programs, providing all of the customer support necessary to ensure the programs run smoothly and efficiently.*** Additionally, the contractor will assist the COR in developing and documenting a comprehensive onboarding project intake process that includes every aspect of onboarding and then onto managing the new customer agency, and provide all consulting necessary to onboard new and potentially new customer agencies.

This includes, but is not limited to:

- Content updates.
- Implementing process changes.
- Serving as a consultant to customer agency programs.
- Quality Assurance.
- Periodic program touch base meetings.
- Maintaining documented business rules.
- Telecom requirements.
- IVR requirements/changes including updating or adding voice recordings in English and/or Spanish at the direction of the government.
- Working with government-provided Salesforce support, ensure customer agency portal and necessary Salesforce intake screens are developed or modified.
- Assisting with modification language and cost estimates for program changes or adding new customer agency programs.
- Maintaining a separate report for each customer agency program providing a detailed list of all program management activities and labor hours. The logs will be reviewed with each and approved by each customer agency.
- Other tasks as needed.

The USAGov team will serve as an escalation path but not the primary interface for customer agency programs. For example, the USAGov team will be available in cases where the Contractor and the customer agency program are in disagreement or in cases where the customer agency program is requesting something that could have a cost and/or scope impact to the contract but the USAGov team should not need to be involved in the everyday management of a customer agency program. Any changes that require additional funds must be approved by the COR.

This includes all functions associated with:

- Site/Center management - The contractor will provide qualified personnel to manage and operate the contact center(s) for optimum performance of systems and personnel. The contractor will analyze historical work volume, employee availability and schedule preferences, and trends to accurately forecast and schedule staffing resources to meet fluctuating workloads. The Contract will employ proven management approaches to ensure optimum utilization of staffing resources to meet service objectives.
- Project management - The contractor will maintain the implementation, operation, and management of all contact center operations for USAGov and all customer agencies.
- Performance management - The contractor will develop and implement required plans, procedures, methodologies, and tools, and perform the planning, oversight, and management functions to ensure that all service delivery performance standards and program deliverables specified in this PWS are met. This includes enabling an environment that supports continuous quality and process improvements throughout the life of this contract.
- Technology management - The contractor will provide all required technology management services to effectively plan, implement, operate and manage the contact center solution. This includes fostering an environment that supports continuous technology innovation throughout the life of this contract.
- Compliance with all information security requirements, including FISMA, GSA IT, and NIST standards.
- Content management- The contractor will assist with and/or write procedural content for CSRs (e.g., how to transfer a call, how to code an interaction) for USA.gov, USAGov en español, and customer agency programs. Additionally, the Contractor will work with the USAGov content team and customer agencies to provide feedback on content.
- Customer satisfaction assessments, as described in this PWS.
- Call Recording Capabilities - The contractor will provide recorded call recordings to any program serviced by the CC. (see *section 3.4 Quality Assurance* for more details)

Day-to-day program management related to the running of the contact center, meeting the key performance indicators, and delivering deliverables as required in this PWS are expected to fall under the firm fixed program management CLINs. Additionally, with the government's approval, the time and materials program management CLIN can be used for outside-the-norm circumstances, such as, for example, if a customer agency requires additional and specialized reporting or requires specialized meetings to discuss upcoming new projects, or the onboarding of a new customer agency requires exceptional effort. The time and materials CLIN cannot be used for correctional activities, such

as if additional meetings are required to discuss key performance indicators that are not being met and taking steps to correct such deficiencies.

3.1 Performance Management

The Contractor will be responsible for maintaining service levels during steady-state, surge, and disaster-recovery operations using the following plans.

3.1.1 Program Management Plan

The Contractor will provide an annual program management plan that identifies and defines the Contractor's organization, roles and responsibilities, and lines of authority, management procedures/policies/plans, escalation procedures for problem/dispute resolution, and reporting requirements for the services to be performed under this contract. This plan must include an organization chart that identifies the entire chain of command in the organization, the organizational components that support this Contract, and the chain of command for these organizational components in support of this Contract. Additionally, the plan will address strategies and objectives, and corresponding actions, roles and responsibilities, schedule with critical paths and dependencies, and quality and risk management approach. In addition, the Contractor is expected to work with the government to identify cost efficiencies and reevaluate performance.

3.1.2 Technical Test and Acceptance Plan

The Contractor will provide an initial test and acceptance plan that identifies the approach the Contractor will use to successfully test, prior to implementation, services and technologies. Prior to any technological upgrades or enhancements, the Contractor will update the test and acceptance plan (see section 4.0 *Deliverables*).

3.1.3 Quality Assurance Surveillance (QASP) Plan

The QASP will capture the performance measurements described below— hereinafter collectively referred to as Key Performance Indicators (KPIs). It must describe how the KPIs will be met, measured, sourced, and validated. Additionally, for the quality KPIs, the QASP must include the details described below. KPIs are intended to measure the Contractor's performance against established metrics. The government reserves the right to adjust or suspend KPIs individually or in their entirety or to add other performance indicators as deemed necessary at any time during the performance period of this contract. Any adjustment, suspension, or addition will be in collaboration with the Contractor and with ample notice for change management. KPIs are structured based on Productivity and Quality standards. The contractor will adhere to the KPIs in the following sections.

Quality KPI QASP Specifics

The Contractor will provide the government with methodologies, and procedures for maintaining effective quality assurance and service improvement programs, including monitoring and assessing performance and service activities to ensure quality services are provided to customers. The government will provide the Contractor with the initial scoring form, and the definitions for each element. The Contractor is responsible to maintain the form and the definitions throughout the life of the contract. The Contractor will maintain these on a Google doc with joint access between the government and the Contractor.

The Contractor's QASP must include the following components when addressing the quality KPIs:

- Quality Standards Document (QSD) that outlines definitions of all quality measures for service delivery on all channels. The QSD will be reviewed and updated to reflect the changing needs and expectations of the customer. All changes to the QSD must be approved by the government.
- QA tools and forms for ongoing assessment and updating of quality measures to reflect customer expectations. QA tools and forms will be reviewed and updated annually. Changes to QA tools or forms must be approved by the government.
- QA methodology that will be used for all programs, including the frequency, scoring methodology, and CSR performance incentives/disincentives.
- Process and methodology that will be used to ensure the accuracy of invoices.
- Process and methodology that will be used to ensure the accuracy of monthly performance and narrative reports.
- Performance.
- Quality results and trends.
- The government's feedback.
- Results from independent quality monitoring.
- Specific action plans for continuous quality improvement (CQI) of performance and customer satisfaction results.

Productivity Key Performance Indicators (KPIs)

Productivity KPIs are considered “mission critical.” KPIs are formally assessed and measured monthly for USAGov and customer agency programs; however, reports have more frequent requirements (daily, weekly), see section 3.6 *Reporting* for more information.

Customer agencies that are currently under a Time and Materials (T&M) model where the Contractor does not determine the number of CSRs that serve the customer agency are exempt from performance KPIs. It is expected that the Contractor will still report on these metrics, but they will not be bound to the targets listed below.

Description	Target	Assessment Period ⁶
<p>Contact Center Availability - The contractor will provide bilingual (English and Spanish) phone, chat, email, and social media services (as required) during normal business hours as defined in section 5.3 <i>Hours of Operation</i>. All incoming calls will be routed through toll-free support numbers and routed to appropriate CSRs with the purpose of responding to the caller issues.</p> <p>Sample Calculation: (Total time in minutes in the month service is not available/ Total time in minutes in the month)</p> <p><i>Processes and Exceptions:</i> Exceptions applied for Holidays (unless the Contractor has been instructed to remain open during Holidays) and events outside of the Contractor's control. Call and chat support will not be provided on Federal holidays as defined in section 5.1.1 <i>Federal Holidays Observed</i> of this PWS. Phone, chat, or email downtime or interface systems failures outside of the Contractor's control that prevent the CC from meeting this performance measure are excluded from this KPI.</p>	100.00%	Monthly
<p>Call Service Level:</p> <p>Sample Calculation: Calls answered within 20 seconds + Calls abandoned within 20 seconds)/(Total calls answered + Total calls abandoned)</p>	80% in 20 seconds or less	Monthly
<p>Call Abandon Rate:</p> <p>Sample Calculation: Number of hang ups and dropped calls / Total number of calls offered)</p> <p><i>Processes and Exceptions:</i> Phone downtime or interface systems failures outside of the Contractor's control that prevent it from meeting this performance measure are excluded from this KPI.</p>	< 3.00%	Monthly

⁶ The assessment period is often more frequent than the monthly measurements analyzed for KPI performance.

Web Chat Service Level: Sample Calculation: $(\text{Initial Response within 20 second} + \text{Initial Chats abandoned within 20 seconds}) / (\text{Total Initial responses} + \text{Total Initial Chats abandoned})$	80% in 20 seconds or less	Monthly
Web Chat Abandon Rate: Sample Calculation: $(\text{Initial Response within 20 second} + \text{Initial Chats abandoned within 20 seconds}) / (\text{Total Initial responses} + \text{Total Initial Chats abandoned})$ <i>Processes and Exceptions:</i> Interface system failures outside of the Contractor's control that prevent it from meeting this performance measure are excluded from this KPI.	< 5.00%	Monthly
Response Time to Inbound Email Messages: Sample Calculation: $(\text{Number of emails resolved in one business day (or 4 business hours)}) / (\text{Total number of emails offered})$ <i>Processes and Exceptions:</i> Interface systems failures outside of the Contractor's control that prevent it from meeting this performance measure are excluded from this KPI.	98.00% in 4 business hours; 100% in 1 business day	Monthly
Occupancy (For T&M Attended Services): The percentage of time that CSRs actually spend handling incoming calls/emails/chats against the available or idle time.	80%	Monthly

Quality Key Performance Indicators (KPIs)

Quality KPIs are critical to the customer experience and will be measured in two areas: Customer Satisfaction and Overall Quality Score. Both will be assessed by the Contractor and the government. The Contractor will not alter the KPIs or the methodologies used to calculate performance without written agreement of the government.

The table below outlines the customer satisfaction (CSAT) targets:

Description	Ideal Target		Measured By
Customer Satisfaction (CSAT): As detailed in section 3.5 <i>Customer Satisfaction</i> , the Contractor will administer Customer Satisfaction (CSAT) surveys. The surveys and survey results will be	Telephone	90%	The Contractor
	Chat	90%	

available to the government, and the Contractor will integrate results into the government's CRM application. The results will be collected, analyzed, and reported monthly by the Contractor to the government as detailed in section 3.6 Reporting.	Email (optional)	85%	
	Social Media (optional)	80%	

Description	Target	Measured By	Assessment Period
Quality Scores: The contractor will monitor and evaluate a random sampling of interactions for each program every month; monthly sample sizes will be statistically significant and directed by the Contractor in accordance with business needs. The contractor will report separate and aggregate scores for USA.gov, USAGov en español, FWS, DOS, FDA, USDA, and Login.gov. (Note: See the FDA section for additional Quality requirements)	94%	The government's quality assurance team will conduct an audit (evaluate interactions) each month which will serve as the official KPI of record.	Monthly

Interim Performance Standards for Quality Scores KPI

Interim is defined as the first six months after the transition is complete, however it is expected that performance monitoring will begin immediately once the contractor begins operations. The government understands that initial months of the contract will involve extensive hiring, training, and coaching of CC staff to reach optimal performance on all access channels. As a result, the government will implement interim key performance indicators (KPIs) for service quality. The government expects the Contractor to comply with these interim KPIs during the interim period and meet all performance standards within six months following the completion of the transition period.

Service Quality KPIs Interactions on All Access Channels	Target	Assessment Period
Months 1-3 of the contract	85%	Monthly
Months 4-6 of the contract	90%	Monthly
Months 7-+of the contract	94%	Monthly

3.1.4 Technical and Program Management Reviews

At least annually, or as requested by the COR, The contractor will host a technical and program management review. This review will include performance to date, including accomplishment of KPIs,

resources (both human and technological), status of new initiatives and technology pilots, and high-level plans for the coming year and risk mitigation approaches.

3.2 Transition

3.2.1 Transition-In Plan (CLIN 10000)

The Contractor must develop a transition plan to be submitted as part of its quote for a seamless transition into service. The government will work with the incumbent and the successor Contractors to ensure a complete and disruption-free transition of services. The Contractor is responsible for the overall success of transitioning USAGov and each customer agency program's contact center operations. The success of the transition will require the Contractor to fully understand each program and to work closely with each customer agency program during the transition period. The contractor is responsible for identifying all necessary tasks, working closely with the USAGov program and each customer agency program point of contact. The Transition Plan must include:

- Methodologies, clearly defined processes, detailed schedules with realistic milestones and specific actions needed to ensure the completion of transition activities, including any required integration of Salesforce and telecom/telephony activities.
- Staffing, including initial staff training and on-boarding for all programs.
- Detailed risk analysis and mitigation strategies to minimize risks to the successful and timely completion of the transition.
- Key events and critical milestone dates.
- Recommended parallel operations with the incumbent USAGov contact center as well as any requested involvement or impacts on services being provided.
- Information or data required from GSA.
- Detailed operational readiness checklist to determine phase-in completeness and facilitate sign-off by GSA prior to full operation status.

The Contractor must complete all transition activities within 90 calendar days to phase in and operationalize the new omnichannel USAGov CC. The Contractor is expected to execute tasks in parallel as required to meet the transition deadline. The contractor is solely responsible for the successful transition plan, working closely with each Customer Agency program and the USAGov program POCs. The Contractor is responsible for establishing and the management of all transition-in plans and activities necessary to ensure the smooth transition of each program.

In addition to the successful transitioning of contact center operations from the incumbent contractor, the Contractor must also ensure USDA is successfully onboarded during the 3-month transition-in period. These onboarding activities must be part of the proposed transition plan.

All transition activities are to be priced as a single Firm Fixed Price item.

3.2.2 Transition Out

The Contractor is responsible for supporting a successful transition to a successor organization, which may be a different vendor or GSA office. During the transition to a successor organization, the Contractor must perform all necessary transition activities, including:

- Minimal interruption of contracted services to customers during the transition period.
- Participation in meetings with the government and/or new Contractor to affect a smooth transition and provide detailed information on current operations, at the CO/COR's discretion.
- Handoff from contractor resources to replacements, either Government personnel or those of a new Contractor, during a transition period consistent with an approved transition plan.
- Any other knowledge transfer activities necessary for a full and complete transition to the successor organization.
- Any materials, documents, tools, etc., that were developed under this contract are property of the government and must be turned over during the transition.

3.3 Contingency And Recovery Support Services

USAGov is committed to providing disruption-free Contractor-provided service to the public during normal operating hours as well as during major disasters and other emergencies. The Contractor will develop and implement contingency and disaster recovery plans and procedures to address continuity of operations in the event of a lapse in service for any reason, including natural or manmade disaster or government shutdown. The vendor's solution should provide for rapid return to service while containing costs. The following are minimum requirements for continuity of operations; however, vendors that exceed these requirements (i.e., restoring more than 40% of pre-outage workload in two business days and restoring to full service levels in fewer than 10 business days) or demonstrate innovative cost-containment approaches may receive higher technical ratings.

The contractor will ensure that all attended and unattended services are restored to pre-outage performance levels within **four hours** after report or discovery of the outage.

For outages caused by a major disaster, The contractor will ensure that all automated services are restored to pre-outage performance levels within **four hours** after report or discovery of outage. The Contractor must develop and submit a plan for the COR's approval within 12 hours after the report or discovery of the service outage for all attended services. The plan must address:

- How the Contractor will handle a minimum of 40% of the pre-outage workload within two business days after the government's approval of the plan.
- How the Contractor will restore full service level within 10 business days after the government's approval of the plan.
- The roles and responsibility of contractor and Government personnel during contingent and disaster events, including provisions for training to prepare them to respond to such events.
- Implementation procedures to test and execute the plan on a regular basis to ensure preparedness for such events.

3.3.1 Program Operations Recovery

In the event of periodic or catastrophic failures that restrict or terminate program operations, the design of both the contact center infrastructure and the communications network servicing the government requirements will include sufficient redundancy to allow normal business operations to continue with minimal disruption and inconvenience to customers for all access channels.

3.3.2 Voice Recovery

Disaster recovery plans for the communications network will address factors including, but not limited to:

- Network routing - If an individual facility should become inaccessible, a sufficient communications network will be in place to allow for forwarding of customer calls to one or more alternate facilities. If the outage is brief, the network will resume normal call routing as soon as the primary facility is operational again.
- Operational impact - Documented policies will exist for assuming workload from an incapacitated facility for immediate, short-term, and long-term relief.
- Simulated tests - Regularly scheduled simulated tests will be conducted for purposes of preparing the staff and assessing the plan's viability.

3.3.3 Data Recovery

Disaster recovery plans will address factors including, but not limited to:

- Backup routines - The ease and frequency of which backup routines are conducted and the ability to backup data on remote servers/processors.
- Effectiveness - The degree to which data can be compressed for backup purposes and the ability to perform unattended backups on high-density/high-capacity storage devices.
- Operational impact - The time that is required to complete backups and the need to remove users from the system to conduct backup routines.
- Data integrity - The methods of maintaining data integrity so that completed transactions are not lost due to outages, system failures, etc.
- Data recovery - The methods of restoring data from backup in the event of a failure (i.e., commercial power failure, system or hardware failures).
- Simulated tests - Regularly scheduled simulated tests will be conducted for purposes of preparing the staff and assessing the plan's viability.

3.3.4 Notification Process

The contractor will implement procedures for communicating to the government primary point of contact and/or designated key personnel of any issues that inhibit contact center operations. This applies to both the CC and all customer agency programs. Such procedures will include an escalation process defining various stages of issue severity and the notification level appropriate to each.

3.4 Quality Assurance

USAGov is committed to delivering high-quality customer service to the public. The quality management and assurance approach includes evaluating individual CSR performance as well as the overall performance of CSRs.

To ensure a high-quality, robust quality assurance program, the contractor will:

- Establish and maintain systems for capturing, analyzing, and reporting quality measures and will analyze operational performance against Government expectations and identify areas of competency and areas of needed improvement.
- Record 100% of all calls. Call recordings will be retained for a minimum of 90 days. The Contractor and the government will be able to download call recordings as needed.
- Store 100% of sent and received emails and web chats via the government furnished Salesforce CRM application.
- Provide the government with access to observe live calls, and recorded calls which include screen captures, and emails.
- Contractor will complete and store quality evaluations using standard scorecards.
- Provide the government with login access to all quality assurance systems and data.
- Participate in regular, joint quality and calibration calls between the government and the Contractor. These calls will include regular discussions of quality monitoring results, trends, and improvement opportunities, and calibration of interactions. Frequency of quality calibration calls will be determined in collaboration with the Contractor after the start of the contract.
- Provide the government with a monthly quality monitoring report that provides performance data for each program (identified in section 3.6 *Reporting*) separately as well as in the aggregate by channel.
- Provide an automated capability to gather and report on customer complaints, compliments, and other service related comments/suggestions. The system will provide the means to capture and transcribe the comments for analyses.
- Work closely with the government to revise the existing evaluation and audit forms and supporting documentation.
- Conduct QA review sessions with customer agencies. During these sessions, the customer agency and the Contractor will listen to calls, review emails or chats, and discuss ways to improve interaction handling. These review sessions serve as an informal calibration session between the customer agency and the Contractor. The frequency of these sessions is at the discretion of the government and based upon the customer agency program's preference and past performance.

3.4.1 Monitoring and Evaluation

The Contractor is responsible for meeting or exceeding all KPIs defined in this PWS. KPIs are measured monthly by program for both USAGov and customer agency programs. However, reports have more frequent requirements, see section 3.6 *Reporting* for more information. The contractor must document the processes used for ensuring the KPIs are met or exceeded in their provided QASP described below.

The Contractor and the government's quality assurance team will perform random monitoring across all CSRs and contact types to assess overall performance of each CSR. The Contractor will conduct regular calibration sessions with the government's QA team to promote consistent and fair quality performance evaluation. The Contractor's Quality Specialists and/or Supervisory CSRs will monitor randomly selected interactions each month to ensure continuous improvement of customer service. The government's QA team will separately audit Contractor interactions to determine if performance expectations are met. The government's monthly audit score will stand as the KPI of record.

Quality Assurance System (QAS)

The Contractor shall provide a secure QAS recording system that meets the information technology security requirements referenced in this PWS (such as FedRAMP certification for cloud-based services, etc...). Additional QAS requirements:

- Ability to record calls.
- Ability to record CSR screen data captures (recorded playback of the full calls, chats interaction from beginning to end).
- Ability to record screen capture recordings from agent desktops for the following programs at indicated levels:
 - FDA, DOS, FWS, and USA.gov: At least 20% screen capture of total call volume monthly.
 - Record 100% of all calls monthly.
 - Retain call recording up to 90 days, keeping only the most recent 90 day library of call/screen recordings.
- Ability for both Contractor and GSA's Quality Team:
 - To listen to calls via the QAS system.
 - The contractor will partition call recordings by customer agency/program such that a customer agency will have access to only their program calls/audits by channel. The GSA team will have access to all program calls and audits by channel.
 - The Contractor must be able to download and provide call recordings as needed for all programs.
 - If call recordings are ever transmitted via email, the file must be encrypted and password protected. The call file(s) and the password would be transmitted in separate emails.
 - Evaluate interactions within the QAS system using the agreed upon scorecard for each channel: phone, email, and chat.
- **Audit Analysis:** Ability to run quality and calibration reports (comparing Government audits to Contractor audits). Ability to create quality reports on individual agent performance and overall group trends.

- **Remote Service Observe (live) access:** “Service observe” telephone calls in real time. This capability may be provided outside of the QAS by access to VDN via phone dial-in.

3.5 Customer Satisfaction (CSAT) (CLIN Series 60000)

To provide high-quality customer service, USAGov seeks to understand the voice of the customer through the use of a robust Customer Service Survey Program that will collect quantitative and qualitative feedback from those who use the CC’s services. Currently, the CSAT program only applies to USA.gov, although the government may engage the Contractor about expanding the CSAT program to interested customer agencies during the life of the contract.

The government will:

- Provide CSAT technology (software/survey instruments and licenses) required to operate the CSAT program for web chat and email customers. Currently, GSA utilizes Qualtrics for this purpose.
- Provide some or all of the questions for the surveys, ensuring compliance with government standards and approval by the Office of Management and Budget.
- Collaborate with the Contractor on necessary improvements to the program suggested by analysis of survey results.
- Collaborate with the Contractor on suggested improvements to the overall CSAT measurement methodology.

The Contractor will:

- Provide CSAT technology (software/survey instruments, programming and licenses) and administration required to operate the CSAT program for phone customers. This solution must consider the legal requirements around surveying customers who call via mobile phones, as those users must be able to be surveyed as well.
- Support CSAT surveys for phone customers that contain both quantitative (i.e. multiple choice or similar) and qualitative (i.e. open-ended) questions.
- Ensure a level of customer survey participation sufficient to provide statistically valid results.
- Provide input to the government on insightful and actionable survey questions to improve the efficacy of the surveys.
- Provide the government with CSAT and quality data monthly, as well as in-depth monthly, quarterly and annual analysis, with corresponding improvement plans/list of action items.
- Incorporate analysis into every aspect of CC performance management, including such areas as quality assurance, call modeling, training, and CSR coaching.
- Provide the government with access to survey data for all channels.
- Integrate survey data from phone, web chat, and potentially email and social media customers into the individual USAGov’s Salesforce case records, which will allow both the Contractor and

the government to review an interaction in the context of the customer's response to the specific interaction.

- Use survey results to support CSR coaching and to identify areas for customer service improvement.
- Integrate survey data with Quality Assurance System, including call recordings and CSR screen captures, and to any other QA evaluations that may have a survey result from the customer. This will allow the Contractor and Government to calibrate QA scoring strategies, such as weighting, with customer preferences.
- Suggest improvements to the CSAT measurement methodology.
- Provide transcriptions of open-ended survey responses if collected by audio recording.

3.6 Reporting

The Contractor must be able to synthesize data generated from relevant systems (such as the ACD, dialer, CTI, CRM [Salesforce], retention, IVR, recording, QA, workforce management, speech analytics, and others) in order to provide reporting and analysis on a real-time and historical basis. Specifically, the Contractor must:

- Create both real-time and historical reports.
- Produce both reports and dashboards accessible to the government.
- Have a single system of record that generates reports in sync with their feeder systems so that there is a single system used to aggregate and display data related to the operations of the contact center.
- Present the data in any format required by the government to report on KPIs.
- Schedule, produce and distribute reports and dashboards according to the deliverable schedule in this PWS to appropriate Government staff.
- Allow various user groups, including Government staff, to see different reports and/or data that are relevant to their specific function.
- Create rules to issue alerts to government personnel when a specific metric or KPI falls out of compliance.
- Create a permissions-based environment that limits data access as needed.

The Contractor will create and provide to the government a number of reports, as detailed below. Each report should be emailed to an identified POC and all reports must be accessible to the government and to individual relevant customer agency programs via the GSA-provided Salesforce instance. Customer agencies access their reports via the Salesforce web portal. The contractor is responsible for uploading reports into the customer agency Salesforce web portals. The government may require Contractor support with the creation of additional custom and ad hoc reports. The contractor will work with the government to define the report's requirements, format, and execution.

The contractor will maintain performance data for the life of the contract. The government reserves the right to verify any report data that the Contractor provides with the source data that the Contractor used to generate those reports.

3.6.1 Daily and Weekly Performance Reports

The Contractor will provide daily and weekly performance reports summarizing operational statistics for individual channels and individual programs and provide a rollup total of all supported programs. Also, the reports will include charts or graphs showing comparisons month-to-month, fiscal year to fiscal year, and same period last year. The government will provide a list of operational statistics to be included in the reports, which is subject to change.

Note that the government may request intraday reports, especially during call surges due to a media event or special situation.

3.6.2 Monthly Billing/Volume/Metric Reports

Metric reports need to be provided by individual customer agency program and for the CC as a whole. All reports not already in Salesforce need to be uploaded into Salesforce.

- Telephone channel.
- Chat Channel less spam, etc.
- (Optional) Email Channel less spam, etc.
- (Optional) Social Media Channel less spam, etc.
- Quality Reports (see *Appendix 5: Quality Report: Measurement Forms And Definitions*).
- Average time to onboard new CSRs from the time of the offer being made to the time the CSR is able to answer customer questions.

3.6.3 Monthly Performance and Narrative Report

Using the monthly volume reports, the Contractor will provide a monthly performance and executive style narrative report that includes metrics, explanations of any unusual metrics, and a narrative. The narrative should include:

- A discussion of major events, problems, outages, and issues encountered during the report period and progress in their resolution.
- Review of KPIs for the month with any deficiencies addressed.
- Inquiry topics by channel.
- List of complaints, compliments and customer feedback.
- Review of outstanding and new action items.
- Overall QA results by channel.
- Quality improvement actions.

- Overview of customer satisfaction survey results (for programs in which the Contractor is responsible for customer satisfaction surveys).
- Analysis of trends and recommendations.

Metrics should be provided in an Excel or similar format as approved by the government to facilitate further analysis by the government.

3.6.4 Inquiry Analysis Report

The Contractor receives a wide variety of questions from the public for USA.gov & USAGov en Español, as well as for our customer agencies. The government would like to understand trends in the subject matter of those questions. Historically, selecting topics from the CRM drop-down menu has been limited to high level topic areas that are not granular enough to be helpful in determining trends and areas for content improvement, especially in the case of USA.gov & USAGov en español. The Contractor must propose a solution as to how it will gather and aggregate public query topic data (e.g. such as through topic modeling of chat transcripts) as specifically as possible so that the contact center can answer questions such as “what are the 10 most frequent questions.” The level of detail for the query topic data may need to be different or more detailed than the topic selected by an CSR when closing a case, and therefore may require modern natural language data analysis methods.

The Contractor will provide a monthly report detailing query topic data and providing insight into what content and information CSRs used to respond to public inquiries each month, including historical data for comparison of individual resources used over time. This Report should include a count of resources used by CSRs, to include, but not limited to, content articles, email templates, phone numbers given for referrals, and external resources such as other government agency websites URLs. The government requires insightful information regarding the nature of the queries from the public as well as the nature of the information provided to the public in response to those queries.

3.6.5 Customer Satisfaction (CSAT) Report

The Contractor will provide a monthly CSAT report that should include:

- Average scores for each survey question asked and percentage each response choice was chosen.
- Key survey statistics, such as number of completed surveys and number of offered surveys.
- A spreadsheet export of all response data and associated survey metadata from each complete survey. The spreadsheet must also include associated information from the referring CSR interaction if applicable and known.
- Analysis containing what actions the survey results indicate should be taken in order to improve scores.

3.6.6 Quality Assurance Report

The Contractor will provide monthly reports on the quality of service achieved for each program and channel type supported. The reports will contain monthly and fiscal year rollup for each of the reported elements identified below, as well as average percentage obtained by quality indicator trended monthly. The report must include the following:

- Number of monitoring sessions conducted for each program (by language).

- Range of scores, median, and average total score by channel and language.
- Range of scores, median, and average total score of the evaluated elements for each service type.
- Overall average percentage obtained by quality indicator.
- Quality improvement actions and results.

For more information on quality assurance measurements, see *Appendix 5: Quality Report: Measurement Forms And Definitions*.

3.6.7 Action and Improvement Report

The Contractor will provide a monthly consulting action and improvement report that will include recommendations for actionable improvements to contact center operations, such as knowledge base content, QA, CSAT processes, training, processes, CSR satisfaction and retention, cost reduction, etc. Improvements identified will be based on industry best practices and/or data analysis.

3.6.8 Intraday Reporting

As needed, the Contractor will proactively report to the government on an intraday basis any unusual situations and/or spikes in volume as well as any identified drivers.

3.6.9 Ad Hoc Reports

Throughout the contract base period and for each of the option periods, the government may request the Contractor to provide up to twelve ad hoc reports per year and in cases of non-performance or expanded or emergency support, more detailed and frequent reports, at no additional cost to the government.

3.6.10 IT Reports

The Information Assurance Officer will provide the following reports: quarterly Plan of Action and Milestone (POA&Ms), monthly vulnerability scans, analysis and reports of servers and applications, and annual Federal Information Security Management Act (FISMA) accreditation reports.

3.6.11 Customer Agency Reports

The government will identify customer agency programs that require separate reporting. The Contractor will deliver all of these reports to the government by the third business day following the last calendar day of the month. If the customer agency programs supported and/or the reports they require change, the Contractor is expected to adjust reporting accordingly to meet the customer agency's needs.

For all Customer Agency programs, the Contractor will:

- Provide a report that summarizes the operational statistics for each of the specified programs. If the program has different channels (i.e., phone, chat, email) then statistics will be broken out by channel as well.
- Provide a consolidated telephone report that provides all volumes, QA statistics, and a written narrative that is updated daily and monthly. The government will provide example reports post-award.

- Prepare a separate performance report for each channel by language. The report will cover activities for a month, unless otherwise specified.

The Contractor will provide a monthly written narrative report for each of the customer agency programs. The report will briefly and factually summarize the month's activities. It will include, at a minimum:

- Review of performance standards for the month with any deficiencies addressed.
- Summary of monthly statistics.
- Review of major events, problems, outages, and issues encountered during the month along with updates on progress and resolution.
- List of the most popular topics of inquiries (by channel, if needed) and any unusual topics or spikes.
- List of customer feedback such as complaints, compliments, and other comments.
- Review of outstanding and new action items.
- Trending of significant data in both chart and narrative formats.
- Recommendations and suggestions to improve the CC program, based on analysis of trends or other data.

If required by the program:

- Demographic profile of inquirers such as location, gender, and source of referral.
- Wrap-up codes.
- Most popular templates used by CSRs (topics by templates).

3.6.12 IVR Reports

A contractor using its own IVR service will provide the government with daily and monthly IVR and toll-free traffic reporting via automated email. Currently, the government also has the capability to access the telecommunications service provider's web portal to obtain ad hoc reports or customized reporting as needed. Additionally, the government accesses the service provider's file transfer protocol (FTP) site to download monthly call records for three of the Toll Free/IVR services.

Additionally, the Contractor will provide a monthly IVR analysis report for each IVR that should include:

- No. of calls (and %) to each published number.
- No. of calls (and %) without published number.
- No. of total calls.
- No. of calls (and %) during business hours.
- No. of calls (and %) after business hours.

- No. of calls (and %) with no entry point.
- Language Check stats (during and after business hours): English, Spanish and calls ended before language check (USA.gov program).
- Business Hours and After Business Hours Stats (English and Spanish) - Use of the IVR options/selections offered to callers, such as in the following examples:

E.g. 1:

- 1 - Emergency 1
- 2 - Emergency 2
- 8 - Repeat
- 3 - Reached menu in error (transfers to CC main agent queue)
- 0 - Agent
- Invalid Selection (transfers to CC main agent queue)

Eg. 2 (during business hours):

- English calls transferred to contact center
- Spanish calls transferred to contact center
- English calls transferred to the CC from the Emergency queue
- Spanish calls transferred to the CC from the Emergency queue
- Calls abandoned prior to transfer to the contact center
- Calls abandoned during transfer/before contact center answered

E.g. 3 - Main Menu and Submenus selections:

- 1 - Subtopic A
 - 2 - Subtopic B
 - 3 - Subtopic C
 - 4 - Subtopic D
 - 5 - Blank (Future Use)
 - 8 - Repeat
 - 9 - Main Menu
- Roll-up numbers for the above to compare the reporting month against YTD figures and previous months in the same fiscal year.
 - Area Code Profile: number of calls (and %) by states and/or territories in the U.S., Canada and the Caribbean region.

3.7 Work Resources And Equipment

USAGov is committed to providing a cost-effective, secure, and disruption-free contact center to respond to the public's inquiries. The Contractor will maintain physical and/or virtual Contractor facilities that will interact with USAGov's telecommunications requirements including the ability to support physical connections as well as Session Initiation Protocol (SIP) trunking for future potential VoIP capabilities. If a physical site is proposed, CC staff will be provided desktop workstations, including computers, telephones and headsets, and other equipment, software, and accessories required to sustain contact center operations. Unless specified by the government, all workstations will be equipped with telecommunications, email, and Internet access. If the proposed solution is 100% virtual without a

physical site, the Contractor must satisfy all of the requirements with a virtual solution. Additionally, The contractor will:

- In the case of a physical location, provide and maintain facilities required to perform task requirements. All Contractor facilities must be located within the contiguous 48 states. Remote CSRs can be located within all 50 states or United States territories.
- In the case of a physical location, the contractor will be responsible for the acquisition, installation, and maintenance of all cable, wiring and support infrastructure required to operate the facility, including, but not limited to: cable distribution systems; conduits; terminals and connectors; raised flooring; and other equipment needed to interconnect and support the contact center systems and operations.
- Ensure that all CSRs have secure Internet access.
- Meet the physical controls of NIST SP 800-53 for GSA IT security.

3.7.1 Work Location

If a physical site is part of the proposed solution, then all Contractor managed site(s) must be located within the United States 48 contiguous states. Remote CSRs can be located in all 50 US states and US territories. The Contractor must be able to provide timely access to a backup solution that supports 24 hours a day, seven days a week operations to ensure continuity of operation in case of system failure and service outage. All Contractor managed site(s) will comply with all applicable state, local, and federal government standards and regulations, such as the Occupational Safety and Health Act (OSHA) of 1970, as revised, and the Americans with Disabilities Act of 1990. The government is open to solutions that propose a 100% virtual solution, but the Contractor must specify how they will fulfill all of the requirements outlined in the PWS with a virtual solution and remote CSRs.

Regardless of the proposed location, the Contractor may be requested to travel to Washington, D.C. to meet with GSA personnel in-person. If this is required, travel will be reimbursed as OLMs pursuant to government travel regulations and approved by the COR in writing in advance.

3.7.2 Facility and Systems Access

The Contractor-provided facilities (if applicable) and systems will be designed to provide physical and information access security with security monitoring and access restriction at all times. Access to the contractor-provided facilities will be provided to authorized government personnel at any time during the normal operation of the contact center. Access to contractor provided systems, including remote access by Contractor employees and authorized government employees, will be restricted to authorized personnel at all times.

Designated government employees and/or their authorized representatives may visit any contact center facility used to support its programs without prior notice for the purpose of conducting on-site reviews, information gathering, or program observation.

3.8 Staffing/Personnel

All matters related to the employment, supervision, compensation, promotion, and discharge of the Contractor's employees will be the responsibility of the Contractor, which is in all respects the employer of such employees. The government requires that all Contractor personnel be fluent in written and spoken American English. In addition, the government requires that all personnel can communicate understandably with the public and the government staff.

The contractor will develop a means for testing written and spoken American English fluency as well as verification of job-specific skills and educational requirements. Additionally, the contractor will develop a means for testing written and spoken Spanish fluency for Contractor staff responsible for Spanish communication. The contractor will describe this verification and testing as part of its response to this PWS. The government reserves the right to review and approve such test and verification processes prior to use. The goal of this testing is to ensure CSRs are able to competently communicate with customers in the appropriate language(s) while answering calls, emails, and chats.

The contractor will perform background checks on all prospective employees in accordance with applicable GSA policy prior to providing them for service under the contract.

The government reserves the right to add other skills categories to meet government needs at any time during the effective period of this contract.

The contractor will be responsible for ensuring the required security clearances for personnel under this contract are processed per GSA requirements. This includes ensuring required paperwork is completed and uploaded into GSA systems.

3.8.1 Key Personnel

The Contractor must have the capability to provide qualified personnel to meet the specific requirements of this contract. At a minimum, The contractor will provide the following key personnel: Program Director (PD), Contact Center Manager (CCM), Information Assurance Officer (IAO), and the Contact Center Content Specialist (CCCS). In the future, all proposed substitutes for key personnel will meet or exceed the qualifications of the person to be replaced. The government will be notified in writing of any proposed substitution of key personnel at least thirty days in advance of the proposed substitution. The Contractor will submit a resume to the government for approval prior to hiring any new key personnel and substitutes. Key personnel vacancies must be filled within 60 days. The government will approve initial contractor key personnel at the time of award. Replacement key personnel must be approved in writing by the government.

Program Director/Manager

The PD/PM will be responsible for the overall management and day-to-day operations of the Contractor and will be the primary contact for the government.

Responsibilities:

- Manage and implement the overall contract requirements and tasks including staffing, operations, and budget.
- Maintain open communication with the government to ensure support for the program and a positive relationship with the contracting organization.
- Ensure that Contractor staff is fully informed of Government communications.
- Ensure that all contract deliverables and KPIs are met.
- Organize, direct, coordinate planning, and implement all contract support activities.
- Coordinate financial and staffing resources.

- Monitor and analyze contract and performance data and report results to senior Government officials.
- Coordinate recruitment and training activities to keep staff current on Customer Agency programs and KPIs.
- Suggest improvements, efficiencies, and cost-cutting strategies based on observations of the operation and quality of customer experiences.

Minimum qualifications:

- Bachelor's Degree in Communications, Business Management or other related field.
- Five years experience in managing complex budgets, human, and other administrative resources involved with the operation of a major communications program.
- Experience with the government contracting environment is desired.
- Experience in identifying innovative solutions and mobilizing staff to adapt to new technologies and program priorities.
- Excellent written and oral communications skills.

Contact Center Manager (CCM)

The CCM is responsible for the day-to-day operations of the omnichannel contact center, including staffing, facility, training, service delivery, problem escalation and resolution, and performance monitoring. The CCM must be dedicated to the Contractor program and not used as a shared resource- a 100% time commitment is required for this position. The CCM must be physically present at the Contractor site (if a facility-based Contractor operation is proposed) at least 75% of his/her time.

Responsibilities:

- Ensure staffing for all access channels consistent with performance measures.
- Ensure adherence to schedules, real time management of staffing and contact queues.
- Manage performance to meet KPIs.
- Ensure that a comprehensive training plan is implemented in the Contractor for all staff.
- Ensure a comprehensive QA plan is implemented in the contact center.
- Ensure that staff has adequate supervision, resources and equipment needed to perform work.
- Work with the applicable Government security clearance team to ensure that staff has received the requisite background clearance as outlined in *Section 5.5.2 Personnel Security*.
- Provide technical assistance to the planning, design, installation, modification, and operation of telecommunications and information systems capabilities.
- Suggest improvements and efficiencies based on observations of the operation and quality of customer experiences.

- Coordinate work with the CRM System Administrator to support the development and implementation of new features and services of the CRM according to business rules.

Minimum qualifications:

- Five years experience in managing a successful omnichannel contact center.
- Demonstrated knowledge of performance and quality management.
- Experience in identifying innovative solutions and mobilizing staff to adapt to new technologies and program priorities.

Information Assurance Officer (IAO)

The IAO responsible for the day-to-day operations of the Contractor information systems and information technology resources needed to fulfill this contract including: facility, training, service delivery, QAS, workforce management systems, problem escalation and resolution, and performance monitoring systems in accordance with GSA IT Security policies.

Responsibilities:

- Immediately report all security incidents in accordance with GSA policy.
- Work closely with the PD/PM to ensure that systems evolve to meet any changing needs of the program.
- Identify and document all problems related to technology and provide the government with a report of these issues along with a performance improvement plan detailing how to resolve and prevent problems from reoccurring.
- Ensure that information systems used in supporting task requirements meet initial and ongoing compliance of information systems security requirements in accordance with Federal Information Publication Standards (FIPS) Publication 200, Minimum Security Requirements of Federal Information Systems through the use of security controls in accordance with the NIST Special Publication 800-53, Recommended Security Controls for Federal Information Systems, as amended.
- Oversee preparation of all required documentation for the compliance process, including security plan, risk assessments, contingency and contingency test plans, configuration management plan, system test and evaluation reports, security certification and accreditation package.
- Prepare continuing responses to reports, data calls and updates throughout the year such as quarterly Plan of Action and Milestone (POA&Ms); monthly vulnerability scans, analysis and reports of servers and applications, and annual Federal Information Security Management Act (FISMA) reporting. Duties may be changed during the year based on program manager priorities.
- Ensure that the IT security requirements (called controls in 800-53) are incorporated in the early planning and execution of the transition as well as early in the development of new projects.

Minimum qualifications:

- Familiarity with NIST IT security publications including NIST SP 800-37, 800-53 and related policies. An IAO should have experience and expertise with applying these policies in a Federal Government IT program and provide the experience and expertise on complying with Federal IT security requirements as defined by the Office of Management and Budget (OMB), NIST and GSA.
- Experience and expertise in supporting Certification and Accreditations for IT systems within the Federal Government. This should include knowledge of all controls at the moderate level and the ability to incorporate these controls into Federal IT systems as well as to evaluate implementation of these controls into Federal IT systems.
- Experience and expertise in oversight of multiple teams supporting the completion of a Certification and Accreditation.
- Expertise conducting vulnerability scans at the operating system level, application level and data bases, completing code reviews and assessing compliance with CIS benchmarks.
- Experience and expertise in completing POA&Ms, FISMA Assessments and other IT security data calls for Federal IT systems.
- Broad familiarity with processes and security tools to provide consulting on strategies for complying with Federal IT security requirements and in the development of IT security architectures for Federal IT programs and related policies to IT security and their implementation for HSPD-12 and privacy requirements.

Contact Center Content Specialist

Responsibilities: The Contact Center Content Specialist (CCCS) will be the government content liaison at the Contractor site. The CCCS will:

- Coordinate and work with the government content team, the USAGov team, the Contractor QA team, and Training Manager(s) to identify Contractor content needs/gaps and ensure implementation of solutions.
- Consult with the government content team on how to write content to fulfill the needs of the contact center in both English and Spanish, including being able to take into account things such as cultural differences.
- Consult with the government content team on how to adapt website content to meet the needs of the CC.
- Consult with and/or directly assist the government content team to review, modify, update, or create existing CC-specific content.
- Support in the development and drafting of training content for CSRs.
- Draft a monthly action and improvement report that will include recommendations regarding content, QA, CSAT, training, etc.
- Serves as the “voice of the contact center” in content discussions and decision making with the government content team.

- At the discretion of the government, draft and/or edit contact center content.

Minimum qualifications:

- Proficient in speaking and writing in American English.
- Experience working at a contact center and deep knowledge of contact center trends and best practices.
- Experience developing content tailored to the needs of contact center agents.
- Familiarity with web content best practices including SEO and user intent.

Preferred qualifications:

- Experience working with contact centers that offer Spanish language services and the best practices for this audience.
- Bicultural (Spanish).
- Experience developing content for websites.

3.8.2 Other Personnel

The following positions are examples of additional personnel that may be part of an offeror's proposal to support contact center operations. The government seeks efficient, flexible staffing models robust enough to satisfy known and surge requirements.

The number of staff required and their specific responsibilities are to be specified by the Contractor and will be updated in the resulting contract. Examples of such positions follow. The government does not specify whether these specific requirements should be fulfilled by one individual or whether one person can fulfill multiple roles. The one exception to this is for customer agencies that are not part of the band pricing model. In these cases, the Contractor is expected to recommend to the government staffing recommendations throughout the life of the contract, but the government reserves the right to adjust these recommendations.

Quality Coordinator

The Quality Coordinator is responsible for ensuring the success and continuous improvement of the contact center's QA program.

Responsibilities:

- Develop and implement a Quality Plan, in collaboration with other key personnel and integral Contractor staff.
- Work closely with the Supervisory CSRs and/or Quality Specialists to identify and implement coaching opportunities and other areas of improvement.
- Collaborate with the PD/PM and CCM to review performance trends and opportunities, identify training needs of staff, and incorporate training improvements to initial and ongoing training programs.

- Ensure that customer experience and feedback data are continually integrated into the QA program.
- Support development of training plans and curriculum.
- Perform root cause analysis and implement solutions and continuous improvements to the program.
- Assist in drafting a monthly action and improvement report that will include recommendations regarding content, QA, CSAT, training, etc.

Minimum qualifications:

- Two or more years experience leading QA functions in a contact center or as a Supervisor CSR in a omnichannel, bilingual contact center.
- Demonstrated experience and knowledge of quality management discipline including: principles, methods, tool development, evaluation, QA, and related technology.
- Excellent written and verbal communication skills.
- Leadership skills with the ability to mentor, evaluate and manage staff.

Lead Trainer

The Lead Trainer is responsible for ensuring that CSRs are effectively trained in properly responding to the public's inquiries using government-provided content, the CRM system, Internet searching, and other applicable tools.

Responsibilities:

- Conduct knowledge-based and operational training targeted at both new hires and established staff. Adapt training as needed to meet the individual needs of trainees.
- Develop training plans and curriculum.
- Develop and administer knowledge assessment testing.
- Assists with QA monitoring, feedback, and coaching.
- Provides reporting on training effectiveness, progress, improvements.
- Assist in drafting a monthly action and improvement report that will include recommendations regarding content, QA, CSAT, training, etc.

Minimum qualifications:

- Two or more years experience in a contact center.
- Experience in customer service training.
- Knowledge of contact center systems and performance statistics.

Customer Service Representatives (CSRs)

The CSRs are responsible for answering inquiries in English and Spanish received through multiple communication channels. CSRs must complete initial training prior to responding to any inquiries on any channel. CSRs must be proficient in using automated tools, searching and retrieving information, and knowledge of contact management systems. The government may decide that CSRs are required to handle Personal Identifiable Information (PII) in the future, and if this were to occur, the Contractor must be able to support this work.

Responsibilities:

- Identify the information needs of customers.
- Provide information that meets the needs of customers and answers their questions in accordance with quality standards and business rules.
- Collect data on each interaction using the provided CRM solution and other identified CC technology.
- Speak and write using plain language.
- Speak in a friendly conversational manner (not scripted) while maintaining a professional tone.
- Use the provided CRM solution and other identified CC technology to help answer questions on all channels, including use of standard templates while still delivering personalized information to each customer.
- Perform internet searches of government websites and other web content to locate specific answers to customer questions.
- Control the pace and flow of the inquiry or request and manage call time effectively.

Minimum qualifications:

- High school diploma or General Educational Development (GED) Certificate.
- Customer service experience and ability to handle inquiries and requests in a courteous and professional manner, including calls received in crisis situations, and/or from abusive callers.
- General knowledge of government programs.
- Language proficiency equivalent to meeting an Interagency Language Roundtable (ILR) Level-5 or S-5 requirement. An Individual at the level:
 - Has a speaking and writing proficiency equivalent to that of an educated native speaker or writer.
 - Has complete fluency in the language, such as speech on all levels is fully accepted by educated native speakers in all of its features, including breadth of vocabulary and idiom, colloquialism, and pertinent cultural preferences.

- Demonstrate skills and knowledge to perform the following functions:
 - Ability to listen to and empathize with customers and acknowledge their concerns.
 - Ability to follow protocol and to apply sensitivity and discretion in handling confidential information.
 - Ability to gather information to determine a customer's needs, apply problem-solving skills, and resolve the inquiry/request effectively.
 - Computer and keyboarding skills sufficient to record information from the inquirer in an accurate and efficient manner.
 - Ability to receive inquiries from the hearing, speech, and visually impaired, as well as other physically impaired callers and route them to the appropriate CSR or queue for response.
 - Ability to receive coaching and performance feedback from supervisor(s).
 - Ability to communicate effectively in writing, including the use of correct grammar when responding to chat and email.

Supervisory Customer Service Representatives (SCSRs)

The SCSRs are responsible for daily supervision of CSRs, QA on all access channels, and performance feedback and coaching.

Responsibilities:

- Monitor CSRs interactions and provide performance feedback and coaching.
- Work with the Quality Coordinator on quality assurance plans, outcomes, performance results, coaching.
- Performing QA on all access channels (interpreting quality standards, calibrating with other Supervisors and the government).
- Track, analyze, and report performance results to CSRs and CC management.
- Provide real time support in the CC, assisting CSRs with questions, problems, resource retrieval, and escalated inquiries.
- Train CSRs on CC operations or other areas as directed by the CCM.

Minimum qualifications:

In addition to meeting minimum education and/or experience requirements for CSRs specified above, SCSRs must meet the following minimum requirements:

- Two or more years experience serving as a CSR at the respective skill level, or one or more years of experience supervising CSRs at the respective skill level.
- Excellent oral, written and interpersonal communications skills.

- Strong organizational skills.
- Experience in quality monitoring, evaluation, and performance management and coaching.
- Experience in monitoring contact center activities (volume, staffing, CSAT data, and KPIs).
- Must be positive and self-motivated with the ability to change priorities on demand.

3.8.3 Recruitment and Retention

The contractor will develop and implement an effective program to ensure timely recruitment and long-term retention of qualified personnel to support contract requirements. At a minimum, the program will address corporate human resources support, recruitment sources, testing and qualification processes, retention techniques and incentives, and employee satisfaction.

3.9 Employee Development

USAGov is responsible for providing answers to the public's questions about the government. Given the breadth and complexity of government-related content, impactful training is of the utmost importance to continuing employee development. As the Contractor will be the face of the government to the public, the Contractor is responsible for maintaining the currency of employees' understanding of the culture, mission, and objectives of USAGov. The Contractor will, as part of program management, provide employees with the training and tools necessary for successful interactions with the public. The effectiveness of training will be assessed against the targets in the Performance Management Plan described in *section 3.1 Performance Management*.

3.9.1 Comprehensive Training Plan

Offerors will provide a comprehensive employee development plan that includes initial training, standard training modules for all CSRs, and ongoing training modules to address new information, coaching, the CRM system, and other specialized topics. Training should include use of government-provided content, the Salesforce CRM system and knowledge base, how to use the internet to search for answers to questions, and other applicable tools, as well as how to communicate with the public to understand the root of their question.

The USAGov Program Office has found that a phased CSR training model—in which CSRs are trained on one program (i.e. USA.gov, FWS, etc.) or one channel (i.e. phone, web chat, etc.) at a time—yields a better customer experience compared to the Universal Agent training model—in which CSRs are expected to accurately address any type of issue across any program or channel, especially in the initial on-boarding phase of work.

3.9.2 Training Program Delivery

. The Contractor must have capabilities across all training modalities and the entire training life cycle:

- Management support of a training program.
- Skills gap analysis and development of training materials—instructor-led or computer-based.
- Technical skills and knowledge in training and adult learning theory.
- Delivery of leadership, skills and knowledge, and supervisory training.
- Evaluation and refinement of training programs.

The Contractor will then maintain high quality customer experiences by executing against the plan on an ongoing basis to keep employees informed of updates to content articles, business rules, websites, and customer agency programs. Training will include industry best practices and foundational concepts in quality monitoring, coaching, performance feedback, supervision, and IT security.

The Contractor will provide all training materials, modules, and documentation to the government for review/reference, and without additional cost to the government. All training must be accessible to remote CSRs, as appropriate. The Contractor will:

- Demonstrate that courseware developers and instructors have the subject matter expertise to interact with students and answer questions, as well as the instructional capability to impart the required information to students.
- Create and execute a contact center training program to address the training of all new personnel and support staff that will support the USAGov contact center.
- Develop and provide training to Government contact center personnel on all technology solutions provided by the Contractor.
- Develop training materials for initial and ongoing training. The government will provide the contractor with previously-used training materials which the contractor may revise/augment, or re-create as appropriate.
- Update training materials as needed and post updates to a designated repository available to GSA employees.
- Develop 508-compliant training materials.
- Provide instructor-led training to all contact center CSRs, with an instructor-led refresher session. provided annually, incorporating changes from the previous year. The Contractor will record these sessions and make these recordings available to the government in an agreed upon format.
- To develop and refine training materials, the Contractor must have access to government training materials, standard operating procedures, knowledge articles, and subject matter experts to develop and refine training materials.
- The government may provide periodic training on changes and new products or services to the Contractor.
- Provide training in a minimally disruptive manner to program operations.
- Provide experienced instructors to create and deliver annual training material to supervisors and CSRs.
- Use technology to provide ongoing training updates and other value-added training. The Contractor is expected to stay up-do-date on training methodologies and delivery tools throughout the course of the contract. Ongoing continuous training modules must address new information, coaching topics, and specialized topics to be addressed based on the government's feedback. A "train the trainer" model is preferred.
- Create all training materials needed to successfully complete both hard- and soft-skill training.

- Develop, implement, and maintain training on how to use the Salesforce CRM and knowledge management application.
- Ensure all training materials support the goals and objectives of USA.gov, USAGov en español, and customer agency programs.
- Include all training modules and lesson plans needed to onboard new CSRs, to ensure that CSRs understand all program goals and objectives, and understand accurate coding used to document all interactions. Training must include IT security.
- Maintain and update all business rules, agent procedures, and program-specific content/procedures to ensure that CSRs have access to accurate and current information.

3.9.3 Training for Program Expansion (CLIN Series 20000)

In addition to executing a continuing education program for contractor staff to maintain required skills and knowledge as part of program management (see *Section 3.0*), the contractor may be tasked by GSA to develop and deliver specific training when launching new programs, capabilities, or tools.

4 DELIVERABLES

The below table contains a list of deliverables that the Contractor will provide to the government. The government will review all deliverables for completeness and accuracy prior to final acceptance and will accept/reject the deliverables within 15 working days of receipt.

Deliverable	Due Date ⁷	Update Frequency ⁸	Section with Further Details
Contingency and disaster recovery plan	75 days	As needed	Section 3.3
Program management plan	15 days	As needed	Section 3.1.1
Technical Test and acceptance plan	30 days	As needed prior to technology upgrades	Section 3.1.2
Quality Assurance Surveillance Plan (QASP)	60 days	As needed	Section 3.1.3
Transition plan	As part of the RFQ	N/A	Section 3.2.1

⁷ Calendar days after contract award

⁸ If significant changes have been made since the last update, plans must be updated in a timely manner to reflect such changes.

Security plan	45 days	As needed	Section 5.5.1
Comprehensive training plan	30 days	As needed	Section 3.9.1
Performance reports		Daily/weekly	Section 3.6.1
Billing/volume/metric reports		Monthly	Section 3.6.2
Performance and narrative report		Monthly	Section 3.6.3
Topic and asset usage report		Monthly	Section 3.6.4
Customer Satisfaction (CSAT) report		Monthly	Section 3.6.5
Quality Assurance report		Monthly	Section 3.6.6
Action and improvement report		Monthly	Section 3.6.7
Intraday Reporting		As needed	Section 3.6.8
Technology and program management review		Annually	Section 2.1.6
OLM report		Monthly	Section 5.4
Ad hoc reports		As needed	Section 3.6.9
IT reports		Monthly/quarterly/annual	Section 3.6.10
Customer Agency reports		Monthly/Daily/As needed	Section 3.6.11

IVR Reports (for vendor-hosted IVR solutions only)		Monthly	Section 3.6.12
Innovation pilot proposals		As needed	Section 2.1.6

5 OTHER PROGRAM REQUIREMENTS

5.1 Federal Holidays Observed

The government observes holidays mandated by federal law (5 United States Code (USC. 6103) and other days authorized under Executive Order that cite that section of the USC) as the issuing authority. On these days, the Contractor will be closed, unless otherwise coordinated with the government, and with the exception of special programs or services requiring service. The government does reserve the right to add additional holidays as declared by the President that may fall outside of the traditional Federal Holiday schedule.

The Office of Personnel Management (OPM) publishes the Federal Holiday schedule at <http://www.opm.gov/policy-data-oversight/snow-dismissal-procedures/federal-holidays/>

5.2 Other Government Closures

In the event of unplanned closure of the government for any reason (e.g. natural disasters, Government shutdown, unscheduled federal holiday, or severe weather) the contractor will make its best effort to mitigate loss of work time through alternate work arrangements. If contractor employees are working on a government installation, this may be done by moving employees to an off-site location. Additional instructions may be provided by the Contracting Officer on a case-by-case basis.

5.3 Hours of Operation

Due to the diversity of agency requirements, the Contractor must have the capability to provide attended (live) service on a 24 hours a day, 7 days a week (24 x 7) basis. The contractor will provide separate rates for Normal Business Hours, Nights, Saturdays and Sundays, and Holidays, as defined below for attended services (all hours listed are in Eastern Standard Time Zone).

Normal Business Hours are defined as the time period between 8:00 am to 8:00 pm Eastern time, Monday through Friday, except for designated Federal Holidays.

Nights are defined as the time period between 12:01 am and 8:00 am, Monday through Friday, and between 8:00 pm and midnight, Monday through Friday, except on designated Federal Holidays.

Saturdays and Sundays are defined as the time period between 12:01 am Saturday and midnight on Sunday.

Federal Holidays are defined as the 24 hour period beginning at 12:01 am on the day of the holiday.

Contact Center Hours of Operation (Live Attended Services)
(all hours listed are in Eastern Standard Time Zone)

Service	Weekdays - Daytime	Weekdays - Nighttime	Saturdays, Sundays, and Federal Holidays
USA.gov CC (includes USAGov en español) General Public Inquiries (Telephone and Web Chat)	8:00 am - 8:00 pm	As needed ⁹	
Department of State Overseas Citizen Services Emergency Response Hotline (Telephone)	8:00 am - 8:00 pm	As needed ¹⁰	
Department of Interior, Fish and Wildlife Service (FWS) (Telephone)	8:00 am - 8:00 pm	None Anticipated	
Food and Drug Administration (FDA) (Telephone)	24-hour coverage		
Login.gov (Telephone and Email)	8:00 am - 8:00 pm	None Anticipated	None Anticipated
USDA (Telephone,	8:00 am - 8:00 pm	None Anticipated	

⁹ In response to specific needs or emergencies, the government may extend the hours of operation of the General Public Inquiry program to include nights, Saturdays and Sundays, and/or Federal holidays. The Contractor will provide options to staff the CC to during such situations as required by the government. The government may direct the Contractor to staff the contact center either by specified daily work volume or defined daily staffing level. The Contractor will provide the required support within 3 hours of notification, when requested by the government.

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In emergency situations, upon receiving notification from the Department of State, the CC provides expanded or 24 x 7 coverage to respond to calls from American citizens from around the world. The Contractor will provide an option to provide telephone coverage during night-time, Saturdays and Sundays, and Federal holidays as required by the government. When requested by the government, the Contractor will provide the required support within 3 hours of notification. The Contractor will work closely with the government to determine the appropriate daily staffing level needed to respond to these inquiries.

Email, Chat, Web form)		
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5.4 Government Furnished Information, Property, And Equipment

The government will furnish pertinent information, property, and equipment to the Contractor for use in the performance of this contract. Examples include, but are not limited to, the following:

- Business rules, guidelines, and preformatted responses.
- Access to historical web chat responses.
- Existing IVR scripts used to support the Contractor operations.
- Escalation procedures and guidelines.
- GSA IT systems security policy and guidelines.
- Existing Quality Assurance (QA) documents and the current Quality Standards Document (QSD).
- Content in a knowledge database provided via Salesforce.
- Complete Salesforce Unlimited Edition, which includes all out of the box Salesforce Service Cloud capabilities as well as a platform for custom development. The government has already customized Salesforce for USA.gov, USAGov en español, and the Customer Agency programs. Further customization may be required for the Contractor to integrate and implement the CRM tool or to launch new requirements. For more information about the Salesforce Service Cloud Unlimited Edition visit the Salesforce website at <http://www.salesforce.com/service-cloud/freetrial-pricing/>.
- Full Salesforce Service Cloud licenses and all necessary features for implementation in sufficient amounts for Contractor personnel, including a reasonable number of licenses for surges.
- Privacy Act guidelines.
- General Government and program specific training materials.
- Government agency contact listing.
- Government travel guidelines.
- Existing script or call guides as presently used to support current agency programs.
- Conflict of interest guidelines.
- Licenses or access to all other customer agency CRM solutions. Some Customer Agency programs provide their own CRM Solution or a specially customized version of GSA's Salesforce solution. A List of CRM solutions currently in use is provided in the table below:

Agency Program	CRM Solution Provided
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USAGov	GSA's Salesforce console
USAGov en Espanol	GSA's Salesforce console
DOI -FWS	GSA's Salesforce console
DOS-OCS	GSA's Salesforce console
GSA -Login.gov	GSA's Salesforce console with unique customizations and workflows to support Login.gov's requirements
HHS-FDA	Primary: EON CRM Back-up: FDA has a form in GSA's Salesforce console as a back-up system in case of an outage.
USDA	USDA will provide its own instance of Salesforce.

Customer Relationship Management Solution (CRM)

GSA's Salesforce CRM - The government will provide the Salesforce Enterprise License Agreement to use Salesforce Service Cloud in order to meet the requirements of this contract. GSA's Salesforce deployment is a cloud-based moderate security level customer relationship management (CRM) system allowing the government to follow a customer's experience from start to finish. The government will:

- Provide the Contractor with GSA's Salesforce application. As previously stated, the government has already customized Salesforce for the CC programs. Further customization may be required for the Contractor to integrate and implement Salesforce or to launch new requirements, however, it is anticipated that the Salesforce application will largely remain the same.
- Provide the Contractor with full Salesforce Service Cloud licenses and all necessary features for implementation in sufficient amounts for Contractor personnel, including a reasonable amount of licenses for surges.
- The government intends to upgrade the GSA Salesforce instance to Lightning in the future.
- GSA's Salesforce Unlimited Edition Licenses include:
 - Full Salesforce Service Cloud license giving access to all basic service cloud features (Knowledge Management, Salesforce Content, and CRM).
 - Chatter.
 - Force.com Platform.
 - Sales Cloud.
 - Service Cloud + Knowledge.
 - Live Agent for Service Cloud.

- Service Cloud Portal/Customer Portal (now Customer Community).

Note that GSA's Unlimited Edition license is comparable to the "Performance" Edition; however, GSA's license does not include Work.com or Data.com. The government owns the Salesforce.com licenses, software and cloud environment related to SF CRM. The government will have full ownership rights of all data entered by the Contractor into the console. At the end of the contract, all information resources developed in support of the SF CRM must be turned over to the government in its entirety

The Contractor will:

- Operate an already-customized Government-provided Salesforce Service Cloud contact center solution and other CRM solutions provided by customer agencies to support a fully operational omnichannel contact center.
- Assist in integrating and implementing (CTI, etc) all CRM solutions provided by the government.
- Submit Salesforce access requests for new personnel or personnel deletions/removals using ServiceNow, GSA's Salesforce O&M ticketing system (access will be provided by GSA).
- As needed, work with government-provided Salesforce development and maintenance staff in order to suggest and test changes to the Salesforce implementation.
- Support the following:
 - Natural Language Processing Capability.
 - Channel Orchestration—the ability to introduce seamless interfaces with other channels.
 - Machine learning capabilities (i.e., for VIA type tools).
 - Automated call back capabilities.
 - Text-to-speech Capability.
 - Simple to use Graphical System Design Interface.
 - Multiple telephone line support both analog and digital.
 - Advanced call screening and call switching options.
 - Call queuing.
 - Call routing.
 - Call transfer.
 - Computer Telephony Integration (CTI) - The system will be capable of displaying caller-relevant information at the CSR workstations (e.g., via screen pop technology). The displayed information may be triggered by DNIS, and/or ANI information, and/or through information entered by the caller or CSR, and/or through data gathered by the IVR service.

5.5 Security

The security requirements identified are applicable to Contractor operated systems on behalf of the government. OMB Memorandum M-09-29 asserts that agencies are responsible for ensuring all IT acquisitions comply with the IT security requirements in the Federal Information Security Management Act (FISMA)(44 U.S.C. 3544), OMB's implementing policies including Appendix III of OMB Circular A-130, and guidance and standards from the National Institute of Standards and Technology (NIST), specifically NIST SP 800-37 and NIST SP 800-53.

- CIO 09-48, IT Security Procedural Guide: Security and Privacy IT Acquisition Requirements available at https://www.gsa.gov/cdnstatic/Security_and_Privacy_Requirements_for_IT_Acquisition_Efforts_%5BCIO_IT_Security_09-48_Rev_4%5D_01-25-2018.docx.

The Contractor is classified under Federal Information Processing Standard (FIPS) Pub 199 at the "moderate" impact level and is therefore required to meet the minimum NIST 800-53 security requirements for "moderate" level systems. In the event the security requirement is lowered to a "low" impact level or raised to a "high" impact level, the Contractor agrees to negotiate in good faith and cooperate with the government to provide the required support to ensure compliance with the minimum requirements for a low or high impact level system, as appropriate, attached are several Appendices that provide a description of the Authorization and Accreditation (A&A) process at GSA and for Federal IT Systems. Please refer to all appendices where applicable. Not all may apply and are provided as a reference.

The Contractor will:

- Meet and comply with all GSA IT Security Policies and all applicable GSA and NIST standards and guidelines, other Government-wide laws and regulations for protection and security of Information Technology, including all reporting requirements pertaining to information systems security prescribed by GSA, NIST, and other Government-wide laws and regulations.
- Provide that all IT systems supporting the Contractor task are certified and accredited by the government's Authorizing Official (AO) prior to initiating operations or in accordance with a schedule approved by the Federal Government. The government will likely issue an interim authority to operate while portions of the A&A package are completed.
- Preparing all A&A documents, where applicable, coordinating the submission of such documents with the AO, and correcting any deficiencies identified in the A&A process until full accreditation from the AO is obtained.

5.5.1 Security Plan

Unless stated otherwise in the contract, the Contractor is responsible for preparing, managing and maintaining all required documentation and fulfilling agency reporting requirements for FISMA compliance process, including e-authentication risk assessment, system categorization, security plan, risk assessments, contingency and contingency test plans, configuration management plan, POA&M, system test and evaluation reports, security certification and accreditation package.

The contractor will develop, implement, and maintain a security plan that ensures the confidentiality, integrity, and availability of information and systems for the duration of this contract. The security plan will contain, at a minimum, the information outlined in Special NIST Publication 800-18, Guide for Developing Security Plans for Information Technology Systems. Additional information may be required at the discretion of agency DAAs in accordance with agency policies or directives as specified in the contract.

5.5.2 Personnel Security

All contractor staff, including all CSR and Supervisory CSRs, will be required to have GSA-approved NACI (Tier-1) clearances¹¹. The Contractor will comply with the government requirements for the NACI clearance process. The government will cover or reimburse the Contractor for all costs associated with clearance processing, excluding supplies. The Contractor will be responsible for completing all clearance-related paperwork and for working with the applicable government security clearance office to provide all necessary security documents, including submitting documentation into government-provided systems and databases to facilitate the clearance process. The contractor personnel responsible for submitting this paperwork must have a Tier 2 (formerly known as MBI) clearance. It is expected that if a single resource has this as a primary responsibility, there will be a backup available with the necessary training and clearance to ensure timely clearance processing. The government reserves the right to change the applicable clearance requirements.

The Contractor must perform appropriate personnel screening in accordance with their administrative hiring policies to determine whether the candidate is suitable for employment. All information collected, and actions taken must be done in accordance with applicable Federal, state, and local laws and statutes. This includes, but is not limited to, collecting and reviewing any or all of the following information for each prospective candidate to determine if the applicant is a potential candidate for employment:

- Credit and/or credit history inquiry.
- Employment verification.
- Drug screening.
- Background check.

The contractor will perform background checks on all prospective employees in accordance with the applicable agency Personnel Security Handbook prior to providing them for service under the contract. At a minimum, this check will ensure that no prospective employee has a criminal misdemeanor or a felony record and has a satisfactory history of credit.

5.5.3 Security Procedures for Emergency Staff Ramp-Up

Periodically, as defined in section *1.0 Background*, the Contractor may serve as a short-term emergency contact center to support other federal agency programs. The Contractor's emergency staff will have an alternative process outlined to receive the necessary security clearance to quickly ramp up services. The Contractor must have the capability to ramp-up contact center operation to fully operational status within forty-eight (48) hours or sooner after contract award in response to crisis and emergency

¹¹ During the course of this contract, if it is determined that contractor staff require a higher level clearance to support new requirements, such as the collection of Personally Identifiable Information (PII), the government will work with the Contractor to ensure compliance with the change in requirements.

situations. This means that the contractor must have the facility (if applicable), technology, and staffing in place to start taking calls within 48 hours of the contract modification. The 48 hour ramp-up requirement is for tasks requiring support of up to 250 seats. This includes the provision of required equipment and facilities, trained staff, telecommunications and automated response solutions, possible round-the-clock attended coverage, and management reports on inquiry activities. The Contractor must ramp-down to the desired staffing level within 24 hours of notification by the government or within the minimum notification period for terminating employment set forth in employment law, whichever is longer.

The Contractor emergency staff will need timely access to tools that are needed for regular core Contractor business. The Contractor will perform the requirements listed, which will be an acceptable background check for all non-core, Contractor emergency staff to access USAGov tools and systems. All access will be terminated after the emergency. For each applicant the Contractor must:

- Perform a records check with Local law enforcement with favorable results.
- Verify Financial Status/Credit check.
- e-Verify, validation results provided.
- Conduct a drug screen and provide the negative results.
- Supervise all applicants with a NACI, pre-cleared, Contractor SCSR when accessing IT resources.
- Submit a Government-provided form which certifies that all of the above requirements have been satisfied for each employee.
- All Contractor personnel will take the annual GSA IT Security Awareness Training Course before being allowed access to GSA computers and networks.

5.5.4 Information and Telecommunications Systems Security

The government requires that all contractor-provided information and telecommunications systems be made secure from unauthorized access and use. Access to the required filing system, including but not limited to written correspondence, will be limited to only those personnel who are authorized to support a given task. The contractor will maintain a listing of those employees with authorized access. When designing system security, Contractor will address factors including, but not limited to:

Information Systems - Ensure that all information handled by computer systems is protected against unauthorized access, misuse, fraud, misappropriation, espionage, sabotage, and inadvertent or deliberate compromise.

Telecommunications Systems - Provision of telecommunications security is sufficient to protect all incoming and outgoing calls and electronic inquiries/responses, and all data collected from these activities, from unauthorized access or loss.

Software Applications and Databases - Access to software applications and databases is limited to only those personnel who are authorized to support a given task. Such restriction is accomplished through the use of customized menus, user log-on identification codes, operator-defined password protection,

and or automatic timeout values. The contractor will use expiration dating as a method of password security maintenance.

Low Impact Software as a Service (SaaS) - The Contractor's agreement to the Low Impact SaaS and FedRAMP requirements are required. If the Contractor does not agree, no contract award will be made. The Contractor must comply with the three-part LiSaaS process to include a federally negotiated Terms of Service (ToS) or End-User License Agreement (EULA), VPAT for 508 accessibility, and security scans. This process is followed by a FedRAMP review and approval process. All documentation must be available to the government at the time of award. More information regarding these requirements can be found in Attachment <ref># GSA IT Security Procedural Guide.

Internet and Email Usage Policy - Guidelines regarding appropriate Internet access and usage is implemented and enforced. Policies addressing access to and disclosure of electronic mail messages sent or received by employees using Contractor's corporate email system will also be implemented and enforced. Such guidelines will inform employees that their privacy does not extend to their use of Contractor-provided equipment or supplies.

System Testing - System testing is performed on a regular basis to monitor adherence to, and compliance with, stated security measures.

Audits - The Contractor will be subject to periodic system audits in the same manner and fashion as conducted by the government. Such audits will relate to both Contractor-provided systems and the Contractor's use of Government-provided data under this contract. Examples of such audits include IG and security audits, generation of active employee listings to verify user identification maintenance practices, retrieval of user activity reports and archived security information, and demonstration of Contractor's ability to monitor, collect, store, and control access to usage data.

Proper Notification - The Contractor will report all attempts made, whether successful or not, to breach the physical security of the facilities or primary data centers where the work is performed, or any related telecommunications and information systems that support each task. The contractor will adhere to applicable agency IT Incidence Handling Procedures for reporting these intrusions, including escalation to Department of Homeland Security FedCIRC if necessary. Such reports will be made to the government as soon as possible and in no event more than twenty-four (24) hours after discovery of the incident. In rare instances, the Contractor may receive calls that threaten the well-being of the government and/or other personnel or property. The contractor will ensure that procedures are in place to report the calls immediately to the appropriate law enforcement agency(ies).

Data Security And Privacy - The contractor will be responsible for properly protecting all information used, gathered, disclosed, or developed as a result of work under this contract. The Contractor will also protect all government data by treating information as sensitive. All information gathered or created under this contract will be considered as confidential information. If Contractor personnel must remove any information from the primary work area, they should protect it to the same extent they would their proprietary data and/or company trade secrets. The use of this data is subject to the Privacy Act and will be utilized in full accordance with all rules of conduct as applicable to Privacy Act Information. Personnel will adhere to the Privacy Act, Title 5 of the U.S. Code, Section 552a and applicable agency rules and regulations

5.5.5 Facility Security

If the Contractor's solution includes a physical site, then the Contractor is responsible for providing a physically secure facility for people, equipment, and documentation. All security requirements apply to the Contractor facility, alternative facility, or any subcontractor facilities. When designing physical security measures, Contractor will address factors including, but not limited to:

Controlled access - All personnel who enter the facility will be issued a badge or identification card. Employees have a permanent badge and approved visitors receive a temporary badge. In general, facility access is limited to: Contractor personnel performing work under contract; authorized government personnel; maintenance personnel or suppliers performing upkeep or repair of facilities or equipment; customer personnel visiting the site on official business; and personnel as approved jointly by the Contractor and the government. The contractor must obtain government approval prior to granting either current or potential customers access to areas where government work is performed. Terminated employees will have their badges removed and their accounts deactivated and/or deleted from any system access immediately upon termination. Proof of such removal will be documented by the Contractor and made available to the government upon request.

Data and telecommunications center - The primary data and telecommunications center is secured through the use of key-code access or equivalent technology with entrance granted only to those requiring access to this area on a regular basis to perform their normal job functions or who are escorted as in the case of visitors or technicians.

5.4 Order-Level Materials (OLMs)

The awardee may be required to include non-Schedule items as part of its quote. Offerors are encouraged to use GSA's order-level materials (OLMs), which are supplies and services in direct support of a Schedule order. OLMs are procured under a special ordering procedure that simplifies the process for acquiring supplies and services necessary to support individual task or delivery orders placed against a Schedule contract or BPA. Using this new procedure, ancillary supplies and services not known at the time of the Schedule award may be included and priced at the order level. Monthly, the Contractor will report OLM spend vs. contract revenue to-date.

For further information on OLMs, see <https://www.gsa.gov/buying-selling/purchasing-programs/gsa-schedules/schedule-features/orderlevel-materials-olms>.

5.5 Ownership Of Data/Materials

All materials developed pursuant to the contract are property of the government. The government retains ownership of all databases, information, data, tools, and other materials used to support the operation of the Contractor (e.g., knowledge base, call flow diagrams, IVR scripts, preformatted responses, business rules, training materials, call guides, other standard operating procedures, inquiry handling tools, etc.) at all times. The Contractor will, upon request from the government, provide a copy of any such materials within 5 business days of receiving a request. At the end of the contract, all materials must be turned over to the government in its entirety. Under no circumstances will the Contractor place a copyright on any of the materials that the Contractor develops, provides and receives payment for pursuant to the contract.

APPENDIX 1: PERFORMANCE WORK STATEMENT ACRONYM LIST

General Services Administration (GSA)
Federal Acquisition Service (FAS)
Technology Transformation Services, Solutions (TTS - QQBC)
USAGov Contact Center Services

Acronym	Description
A&A	Authorization Certification and Accreditation
ACD	Automatic Call Distributor
AHT	Average Handle Time
ANI	Automatic Number Identification
API	Application Programming Interface
ASA	Average Speed to Answer
CC	Contact Center
CCM	Contact Center Manager
CMS	Content Management System
CO	Contracting Officer
COE	Center of Excellence

Acronym	Description
IAO	Information Assurance Officer
ILR	Interagency Language Roundtable
ISSM	Information System Security Manager
ISSO	Information System Security Officer
IVR	Interactive Voice Response
KB	Knowledge Base
KPI	Key Performance Indicator
NCC	National Contact Center
NIST	National Institute of Standards and Technology
OCIO	Office of Chief Information Officer
OCS	Overseas Citizen Services

COR	Contracting Officer Representative
CRM	Customer Relationship Management
CSR	Customer Service Representative
CTI	Computer Telephony Integration
CUI	Controlled Unclassified Information
DNIS	Dialed Number Identification Service
DOC	Department of Commerce
DOI	Department of Interior
DOL	Department of Labor
DOS	Department of State
FAR	Federal Acquisition Regulation
FCIC	Federal Citizen Information Center
FDA	Food and Drug Administration
FIPS	Federal Information Processing Standard

ODC	Other Direct Costs
OPM	Office of Personnel Management
OS	Operation System
PBX	Private Branch Exchange
PD	Program Director
POA&M	Plan of Action and Milestone
POTS	Plain Old Telephone Service
PWS	Performance Work Statement
QA	Quality Assurance
QP	Quality Plan
QSD	Quality Standards Document
SAM	System for Award Management
SCSR	Supervisory Customer Service Representative
SCRM	Salesforce Customer Relationship Management

FISMA	Federal Information Security Management Act of 2002
FWS	Fish and Wildlife Services
HHS	Department of Health and Human Services

SMS	Short Message Service
SSP	System Security Plan
USDA	United States Department of Agriculture

APPENDIX 2: SECURITY REQUIREMENTS

PERSONNEL BACKGROUND INVESTIGATION REQUIREMENTS

The contractor will require access to Government sensitive information and/or access to Government information systems. All contractor personnel must successfully complete, at a minimum, a National Agency Check with Written Inquiries (NACI) in accordance with Homeland Security Presidential Directive-12 (HSPD-12), Office of Management and Budget (OMB) guidance M-05-24, M-11-11 and as specified in GSA CIO Order 2100.1 and [Personnel Security and Suitability Program Handbook](#) for background investigations to provide services under this contract. The required background investigations for administrative personnel will be a minimum of a National Agency Check with Written Inquiries (NACI) and for technical staff and personnel who handle Personal Identifiable Information (PII) will be a Minimum Background Investigation (MBI) or higher depending upon their access and control over the systems. The COR will identify all individuals who require system accounts and verify that they have successfully completed the required background investigations prior to providing them access to Government sensitive information or information systems.

The contractor will insert this clause in all subcontracts when the subcontractor is required to have physical access to a federally-controlled facility or access to a Federal information system.

Protection of Government Information

The contractor will:

- Be responsible for properly protecting all information used, gathered, or developed as a result of this contract.
- Implement procedures that ensure that appropriate administrative, technical, and physical safeguards are established to ensure the security and confidentiality of sensitive government information, data, and/or equipment.
- Ensure procedures are consistent with Government and GSA policies, including GSA Order 2100.1, Information Technology Security Policy, OMB Circular A-130, Management of Federal Information Resources, OMB M-06-16, OMB M-07-16, HSPD12, and the Privacy Act.
- Comply with the procedures, policies, rules, and regulations governing the conduct of personnel or protection of Government facilities and data as expressed by GSA, written or oral during all activities and operations on Government premises The contractor will.
- Ensure that all Contractor personnel take the annual GSA IT Security Awareness Training Course before being allowed access to GSA IT assets and resources.
- Insert this clause in all subcontracts when the subcontractor is required to have physical access to a federally-controlled facility or access to a Federal information system:

Personnel Security Clearances

It is anticipated that certain work under this contract will require a security clearance per 5.5.2 Personnel Security. At least one person must possess a clearance at this level or higher. Clearance level and additional guidance is provided on the Department of Defense Contract Security Classification Specification (DD Form 254). See Section J.

FAR and GSAM Clauses:

FAR Clause 52.204-2, Security Requirements (Aug. 1996)

- (a) This clause applies to the extent that this contract involves access to information classified "Confidential," "Secret," or "Top Secret."
- (b) The contractor will comply with --
 - (1) The Security Agreement (DD Form 441), including the National Industrial Security Program Operating Manual (DoD 5220.22-M); and
 - (2) Any revisions to that manual, notice of which has been furnished to the Contractor.
- (c) If, subsequent to the date of this contract, the security classification or security requirements under this contract are changed by the government and if the changes cause an increase or decrease in security costs or otherwise affect any other term or condition of this contract, the contract will be subject to an equitable adjustment as if the changes were directed under the Changes clause of this contract.
- (d) The Contractor agrees to insert terms that conform substantially to the language of this clause, including this paragraph (d) but excluding any reference to the Changes clause of this contract, in all subcontracts under this contract that involve access to classified information.

GSAM Clause 552.204-9, Personal Identity Verification Requirements (Oct. 2012)

- (a) The contractor will comply with GSA personal identity verification requirements, identified at <http://www.gsa.gov/hspd12>, if contractor employees require access to GSA controlled facilities or information systems to perform contract requirements.
- (b) The contractor will insert this clause in all subcontracts when the subcontractor is required to have access to a GSA controlled facility or access to a GSA-controlled information system.

GSAM Clause 552.236-75, Use of Premises (April 1984)

- (a) If the premises are occupied, the Contractor, his subcontractors, and their employees will comply with the regulations governing access to, operation of, and conduct while in or on the premises and will perform the work required under this contract in such a manner as not to unreasonably interrupt or interfere with the conduct of Government business.
- (b) Any request received by the Contractor from occupants of existing buildings to change the sequence of work will be referred to the Contracting Officer for determination.
- (c) If the premises are occupied, the Contractor, his subcontractors and their employees will not have access to or be admitted into any building outside the scope of this contract except with official permission.

GSAM Clause 552.239-70, Information Technology Security Plan and Security Authorization

(June 2011)

All offers/bids submitted in response to this solicitation must address the approach for completing the security plan and certification and security authorization requirements as required by the clause at [552.239-71](#), Security Requirements for Unclassified Information Technology Resources.

GSAM Clause 552.239-71, Security Requirements for Unclassified Information Technology

Resources (Jan 2012)

(a) *General*. The contractor will be responsible for information technology (IT) security, based on General Services Administration (GSA) risk assessments, for all systems connected to a GSA network or operated by the Contractor for GSA, regardless of location. This clause is applicable to all or any part of the contract that includes information technology resources or services in which the Contractor has physical or electronic access to GSA's information that directly supports the mission of GSA, as indicated by GSA. The term information technology, as used in this clause, means any equipment, including telecommunications equipment that is used in the automatic acquisition, storage, manipulation, management, control, display, switching, interchange, transmission, or reception of data or information. This includes major applications as defined by OMB Circular A-130. Examples of tasks that require security provisions include:

- (1) Hosting of GSA e-Government sites or other IT operations;
- (2) Acquisition, transmission, or analysis of data owned by GSA with significant replacement cost should the Contractors copy be corrupted;
- (3) Access to GSA major applications at a level beyond that granted the general public; e.g., bypassing a firewall; and
- (4) Any new information technology systems acquired for operations within the GSA must comply with the requirements of HSPD-12 and OMB M-11-11. Usage of the credentials must be implemented in accordance with OMB policy and NIST guidelines (e.g., NIST SP 800-116). The system must operate within the GSA's access management environment. Exceptions must be requested in writing and can only be granted by the GSA Senior Agency Information Security Officer.

(b) *IT Security Plan*. The contractor will develop, provide, implement, and maintain an IT Security Plan. This plan will describe the processes and procedures that will be followed to ensure appropriate security of IT resources that are developed, processed, or used under this contract. The plan will describe those parts of the contract to which this clause applies. The Contractors IT Security Plan will comply with applicable Federal laws that include, but are not limited to, 40 U.S.C. 11331, the Federal Information Security Management Act (FISMA) of 2002, and the E-Government Act of 2002. The plan will meet IT security requirements in accordance with Federal and GSA policies and procedures. GSA's Office of the Chief

Information Officer issued "CIO IT Security Procedural Guide 09–48, Security Language for Information Technology Acquisitions Efforts," to provide IT security standards, policies and reporting requirements. This document is incorporated by reference in all solicitations and contracts or task orders where an information system is contractor owned and operated on behalf of the Federal Government. The guide can be accessed at <http://www.gsa.gov/portal/category/25690>. Specific security requirements not specified in "CIO IT Security Procedural Guide 09–48, Security Language for information Technology acquisitions Efforts" will be provided by the requiring activity.

(c) *Submittal of IT Security Plan.* Within 30 calendar days after the contract award, The contractor will submit the IT Security Plan to the Contracting Officer and Contracting Officers Representative (COR) for acceptance. This plan will be consistent with and further detail the approach contained in the contractors proposal or sealed bid that resulted in the award of this contract and in compliance with the requirements stated in this clause. The plan, as accepted by the Contracting Officer and COR, will be incorporated into the contract as a compliance document. The contractor will comply with the accepted plan.

(d) *Submittal of a Continuous Monitoring Plan.* The Contractor must develop a continuous monitoring strategy that includes:

- (1) A configuration management process for the information system and its constituent components;
- (2) A determination of the security impact of changes to the information system and environment of operation;
- (3) Ongoing security control assessments in accordance with the organizational continuous monitoring strategy;
- (4) Reporting the security state of the information system to appropriate GSA officials; and
- (5) All GSA general support systems and applications must implement continuous monitoring activities in accordance with this guide and NIST SP 800-37 Revision 1, *Guide for Applying the Risk Management Framework to Federal Information Systems: A Security Life Cycle Approach*.

(e) *Security authorization.* Within six (6) months after contract award, The contractor will submit written proof of IT security authorization for acceptance by the Contracting Officer. Such written proof may be furnished either by the Contractor or by a third party. The security authorization must be in accordance with NIST Special Publication 800-37. This security authorization will include a final security plan, risk assessment, security test and evaluation, and disaster recovery plan/continuity of operations plan. This security authorization, when accepted by the Contracting Officer, will be incorporated into the contract as a compliance document, and will include a final security plan, a risk assessment, security test and evaluation, and disaster recovery/continuity of operations plan. The contractor will comply with the accepted security authorization documentation.

(f) *Annual verification.* On an annual basis, The contractor will submit verification to the Contracting Officer that the IT Security plan remains valid.

(g) *Warning notices.* The contractor will ensure that the following banners are displayed on all GSA systems (both public and private) operated by the Contractor prior to allowing anyone access to the system:

Government Warning

****WARNING**WARNING**WARNING****

Unauthorized access is a violation of U.S. law and General Services Administration policy, and may result in criminal or administrative penalties. Users will not access other users or system files without proper authority. Absence of access controls IS NOT authorization for access! GSA information systems and related equipment are intended for communication, transmission, processing and storage of U.S. Government information. These systems and equipment are subject to monitoring by law enforcement and authorized Department officials. Monitoring may result in the acquisition, recording, and analysis of all data being communicated, transmitted, processed or stored in this system by law enforcement and authorized Department officials. Use of this system constitutes consent to such monitoring.

****WARNING**WARNING**WARNING****

h) *Privacy Act notification.* The contractor will ensure that the following banner is displayed on all GSA systems that contain Privacy Act information operated by the Contractor prior to allowing anyone access to the system:

This system contains information protected under the provisions of the Privacy Act of 1974 (Pub. L. 93-579). Any privacy information displayed on the screen or printed will be protected from unauthorized disclosure. Employees who violate privacy safeguards may be subject to disciplinary actions, a fine of up to \$5,000, or both.

(i) *Privileged or limited privileges access.* Contractor personnel requiring privileged access or limited privileges access to systems operated by the Contractor for GSA or interconnected to a GSA network will adhere to the specific contract security requirements contained within this contract and/or the Contract Security Classification Specification (DD Form 254).

(j) *Training.* The contractor will ensure that its employees performing under this contract receive annual IT security training in accordance with OMB Circular A-130, FISMA, and NIST requirements, as they may be amended from time to time during the term of this contract, with a specific emphasis on the rules of behavior.

(k) *GSA access.* The contractor will afford GSA access to the Contractor's and subcontractors' facilities, installations, operations, documentation, databases, IT systems and devices, and personnel used in performance of the contract, regardless of the location. Access will be provided to the extent required, in GSA's judgment, to conduct an inspection, evaluation, investigation or audit, including vulnerability testing to safeguard against threats and hazards to the integrity, availability and confidentiality of GSA data or to the function of information technology systems operated on behalf of GSA, and to preserve evidence of computer crime. This information will be available to GSA upon request.

(l) *Subcontracts.* The contractor will incorporate the substance of this clause in all subcontracts that meet the conditions in paragraph (a) of this clause.

(m) *Notification regarding employees.* The contractor will immediately notify the Contracting Officer when an employee either begins or terminates employment when that employee has access to GSA information systems or data. If an employee's employment is terminated, for any reason, access to GSA's information systems or data will be immediately disabled and the credentials used to access the information systems or data will be immediately confiscated.

(n) *Termination*. Failure on the part of the Contractor to comply with the terms of this clause may result in termination of this contract.

Other Related GSA Policies

The following GSA policies, as well as any revisions issued to these policies during the life of the contract, must be adhered to:

These policies can be found at <http://www.gsa.gov/directives-library>

1. CIO P 2100.1L CHGE 1 GSA Information Technology (IT) Security Policy
2. CIO P 2100.2B GSA Wireless Local Area Network (LAN) Security
3. CIO 2100.3C Mandatory Information Technology (IT) Security Training Requirement for Agency and Contractor Employees with Significant Security Responsibilities
4. CIO 2104.1B CHGE 1 GSA Information Technology (IT) General Rules of Behavior
5. CIO 2105.1D GSA Section 508: Managing Information and Communications Technology (ICT) for Individuals with Disabilities
6. OSC2106.2 GSA Social Media Policy
7. CIO 2160.4A Provisioning of Information Technology (IT) Devices

APPENDIX 3: GSA IT SECURITY PROCEDURAL GUIDE: MANAGING ENTERPRISE RISK, CIO-IT SECURITY-06-30

This appendix is included via an attachment.

APPENDIX 4: CUSTOMER WORKFLOWS

This appendix is included via an attachment.

APPENDIX 5: SAMPLE QUALITY FORM AND DEFINITIONS

This appendix is included via a series of attachments. Specifically, attached are:

- Current quality standard definitions (QSD)
- A sample USA.gov Quality Monitoring Form

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